

# **EZAGENT FOR WINDOWS**

## **USERS MANUAL**



# EASYAGENT FOR WINDOWS

## USERS MANUAL

### LICENSE AND SALES AGREEMENT GRANT OF LICENSE

This document is an agreement between you, the end user, and Agency Software, Inc. By initial installation and/or use of any of the programs which are part of Agency Software, Inc. (EasyApps 32-Bit, EasyApps Professional, EZAgent, Par3 and AgencyPro herein after called the program), you are agreeing to become bound by the terms of all parts of this agreement. This agreement constitutes the complete agreement between you and Agency Software, Inc., and it may not be changed or terminated orally but only by an instrument in writing signed by the party against whom enforcement of any waiver, change, modification, extension, discharge or termination is sought.

**GRANT OF LICENSE.** In consideration of payment of the License Fee, which is a part of the price you paid for this product, Agency Software, Inc., as Licensor, grants to you, the Licensee, nonexclusive right to use and display this copy of the program at a single location.

**OWNERSHIP OF THE PROGRAM.** As licensee, you own the magnetic or other physical media on which the program is originally or subsequently recorded or fixed, but Agency Software, Inc. retains title and ownership of the program recorded on the original disk copy(ies) and all subsequent copies of the program, regardless of the form or media in which the original and other copies may exist. This license is not a sale of the original program or any copy.

**USE RESTRICTIONS.** As the Licensee, you may physically transfer the program from one computer to another provided that the program is used only by up to **FIVE LICENSED USERS**. A licensed user is defined as a single person to whom the software is licensed. This means that you may use the software on any computers associated with the single licensed user including office, home, notebook, and network computers. Branch offices, satellite offices, or **multiple businesses sharing the same location** are **not** covered under this agreement. Additional licenses for more than five people may be purchased at an additional fee.

**TRANSFER RESTRICTIONS.** The program is licensed only to you, and may not be transferred to anyone without the prior written consent of Agency Software, Inc. Any authorized transferee of the program shall be bound by the terms and conditions of this agreement. In no event may you transfer, assign, rent, lease, sell or otherwise dispose of the program on either a temporary or permanent basis.

Agency Software, Inc.'s entire liability and your exclusive remedy as to the disk(s) shall be at Agency Software Inc.'s option, either (a) return of the purchase price, or (b) replacement of the disk(s) that do not meet the above stated limited warranty and which is returned to Agency Software, Inc. with a copy of the receipt. If a failure of the disk had resulted from accident, abuse, or misapplication, Agency Software, Inc. shall have no responsibility to replace the disk(s) or refund the purchase price. Any replacement disk(s) will be warranted for the remainder of the original warranty period or thirty (30) days, whichever is longer.

**IN NO EVENT WILL AGENCY SOFTWARE, INC. BE LIABLE FOR ANY DAMAGES INCLUDING LOST PROFITS, LOST SAVINGS, OR OTHER INCIDENTAL OR CONSEQUENTIAL DAMAGES RESULTING FROM THE USE OR INABILITY TO USE THE PROGRAM, EVEN IF AGENCY SOFTWARE INC. HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES, OR FOR ANY CLAIM BY ANY OTHER PARTY.**

## **CREDITS AND COPYRIGHT**

EZAgent for Windows

Program written by K. Mitchell McInelly

User's Manual & Windows Help Files written by Esther Mann and Julia Kelly

All Rights Reserved

Copyright 2005-2011

AGENCY SOFTWARE, INC.

215 W. Commerce Dr.  
Hayden, Idaho 83835

Sales & Technical Support 800-342-7327

## EZAgent Table of Contents

<b>LICENSE AND SALES AGREEMENT</b>	<b>3</b>
<b>GRANT OF LICENSE</b>	<b>3</b>
<b>CREDITS AND COPYRIGHT</b>	<b>5</b>
<b>History of Agency Software, Inc.</b>	<b>9</b>
<b>What is EZAgent?</b>	<b>10</b>
<b>TECHNICAL INFORMATION / SYSTEM REQUIREMENTS</b>	<b>11</b>
<b>Server</b>	<b>11</b>
<b>Workstation</b>	<b>11</b>
<b>Standalone</b>	<b>12</b>
<b>SECTION I: INSTALLATION PROCEDURES</b>	<b>15</b>
<b>STANDALONE (no network involved)</b>	<b>15</b>
<b>NETWORK INSTALLATION</b>	<b>19</b>
<b>Setting Up a Dedicated Server</b>	<b>19</b>
<b>Setting Up a Non-Dedicated Server</b>	<b>23</b>
Mapping a Drive Letter in a Windows XP Non-Dedicated Server	23
<b>Program Installation at the Non-Dedicated Server</b>	<b>25</b>
<b>Setting Up the Workstations for either a Dedicated Server or Peer-to-Peer Network</b>	<b>25</b>
Mapping the Drive on Workstations	25
Installing the Program at Workstations	26
<b>SECTION II: HINTS &amp; TIPS</b>	<b>27</b>
<b>SECTION III: EZAgent For Windows Features</b>	<b>30</b>
<b>The Clients Window</b>	<b>30</b>
Adding a Client	30
Editing Client Information	30
Deleting a Client	31
The Clients Toolbar	31
Using Outlook with EZAgent	33
<b>The Policies Window</b>	<b>33</b>
Policy Options	34
Display Options	34

For Options _____	34
Additional Details for Using the Policies Window _____	35
Add A New Policy _____	35
<b>The Web View Window _____</b>	<b>38</b>
How to Use the Web View Window _____	39
The Web View Toolbar _____	40
<b>The Claims Window _____</b>	<b>42</b>
<b>The Acords Window _____</b>	<b>44</b>
ACORD Options _____	44
<b>The Formview Window _____</b>	<b>47</b>
The Formview Toolbar _____	48
The ACORD Formview Dropdown Menus _____	48
<b>Entering Client Information in ACORD Forms _____</b>	<b>51</b>
<b>Certificate Holders _____</b>	<b>51</b>
Certificate Holders Menu _____	52
Vehicle Database _____	56
<b>Equipment Database _____</b>	<b>58</b>
Add Equipment to the Equipment Database _____	58
<b>Drivers Database _____</b>	<b>58</b>
Add Drivers to the Drivers Database _____	58
<b>E-mailing Forms _____</b>	<b>59</b>
<b>The Notes Window _____</b>	<b>62</b>
<b>The Personal Window _____</b>	<b>62</b>
<b>The Reports Window _____</b>	<b>64</b>
Open a Built-in Report _____	64
Create a Custom Report _____	64
Create Mailing Labels _____	66
Edit a Report _____	66
Permanently Delete a Report _____	66
<b>The Letters Window _____</b>	<b>66</b>
What's In the Letters Window _____	66
Merge Client Data Into a Letter _____	67
Creating Custom Merge Documents _____	67
Attaching Letters to Clients _____	69
<b>The EZAgent Document Manager _____</b>	<b>70</b>
Adding Files with the Document Manager _____	71
Adding Files from the Images Window _____	72
Adding Files with the Desktop Document Manager Icon _____	73

Adding Files from ScanSoft™ PaperPort 9 _____	75
Using Your Attached or Linked Files in EZAgent _____	76
<b>The Surveys Window _____</b>	<b>80</b>
<b>The TFile Window _____</b>	<b>80</b>
The TFile Window Buttons (left to right) _____	81
Transactions Display Options _____	81
Date Range Display Options _____	81
<b>The Calendar Window _____</b>	<b>83</b>
Change Calendar View _____	85
<b>The Setup Window _____</b>	<b>86</b>
Your Agency Information _____	86
Companies Information Database _____	87
Employees Information Database _____	87
Agency Defined Demographics _____	89
<b><i>SECTION V: TROUBLESHOOTING</i> _____</b>	<b><i>91</i></b>
<b>EZAgent Slow to Open _____</b>	<b>91</b>
<b>EZAgent Locks on Opening _____</b>	<b>91</b>
<b>User Can't Delete Clients _____</b>	<b>91</b>
<b>User Can't Add New Clients _____</b>	<b>91</b>
<b>User gets Key Violation when Logging In _____</b>	<b>91</b>
<b>Cannot Perform Operation on Open Dataset _____</b>	<b>91</b>
<b>Index Out of Date _____</b>	<b>91</b>
<b>Corrupt File Other than Index _____</b>	<b>92</b>
<b>Unrecognized Tag in Mail Merge _____</b>	<b>92</b>
<b>Printer Doesn't Print from EZAgent _____</b>	<b>92</b>
<b>Text Won't Fit into Lines on Forms _____</b>	<b>92</b>
<b><i>Index</i> _____</b>	<b><i>93</i></b>

Copyright 2005-2011 by Agency Software, Inc.

All Rights Reserved

No part of this manual may be reproduced, transmitted, transcribed, stored in a retrieval-based system, or translated into any language, natural or automated, in any form or by any means, without the prior written consent and permission of an officer of Agency Software, Inc.

The software described in this manual is protected by copyright laws outlined on the envelope containing the mentioned program CD-ROM.

This manual could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein. These changes may be incorporated in new additions of the manual.

### **EZAGENT FOR WINDOWS**

Is a registered trademark of Agency software, Inc.

**ACORD** is a registered trademark of ACORD Corp.

**Windows** is a registered trademark of Microsoft Corp.

## **WELCOME**

### **History of Agency Software, Inc.**

Agency Software, Inc. (ASI), established in 1988, has been the forerunner of property & casualty insurance software since its inception date. Founded by James M. Carpenter and current President and CEO K. Mitch McInelly, ASI has an existing insurance user group that exceeds 18,000 agents. With 70,000 insurance agents in the United States, ASI is proud to claim an installation base rate of nearly 26% of all agencies, and over 30% of all automated (PC based) agencies in the U.S.A. ASI has helped these agencies' users actuate their PC's for the purpose of increasing overall penetration of personal and commercial lines markets.

ASI has proven to be an invaluable asset to their agency users through the creation and support of an impressive library of insurance software products. These products include such industry standards as PAR5, PAR3, EasyApps, EasyApps Professional, EZAgent, Agency Pro and AgencyPro SQL Edition.

## **What is EZAgent?**

EZAgent is a central data store for all your client information, with direct access to insurance company web sites.

For years, agents have been populating their companies' databases with their own client information. Now it's time to get that information back! Keep your client information in your own database as well as in the company database, and pull existing client information from the company database into your own EZAgent database.

EZAgent also makes it easy to transfer all of your customer information from Outlook into the Clients window in EZAgent – all you do is drag the customer name from the Outlook window and drop it onto the EZAgent icon on your desktop.

EZAgent lets you create and track your clients' policies, claims, personal data (family names, birthdays, and such), and any notes you wish to permanently record about client interactions.

In EZAgent, you can create current reports of data such as Commission by Rep and Customer by Expiration Date, your own custom reports for any specific data you want, and mailing labels for any or all of the clients in your EZAgent database.

You can also write letters to specific clients or create form letters for several clients, and attach those letters to specific clients so you can find them easily in the future. There are many pre-built marketing letters that you can either use as is or edit, and they are ready to merge with client data such as names, addresses, and personal and policy information.

EZAgent also has a Tickler system for reminders, and an automatic transactional file that records every transaction anyone makes in EZAgent.

In short, EZAgent makes your work as an agent much more efficient and productive and less tedious. EZAgent puts you in control of your clients' insurance needs!

## TECHNICAL INFORMATION / SYSTEM REQUIREMENTS

**EZAgent Program System Requirements: What you must have and do to use EZAgent for Windows for the first time.**

### ***Server***

- Pentium (2+ ghz recommended)
- 2 gig RAM (4 gig recommended)
- 100 MB hard drive space free
- 100 MBPS network card (gig recommended)
- Windows 2000, or XP Professional (NOT ME), Vista, or Windows 7
- 56K modem w/internet connection (DSL or cable recommended)
- Video settings 256 colors or greater
- Internet Explorer 7.0 or greater installed
- CD-ROM (required only at server or standalone computer – not required at workstations)

### ***Workstation***

- Pentium (1+ ghz recommended)
- 1 gig RAM (2 gig recommended)
- 100 MB hard drive space free
- 100 MBPS network card
- Windows 98, NT, 2000, XP, Vista or Window 7
- Video setting 256 colors or greater

## ***Standalone***

- Pentium (1+ ghz recommended)
- 1 gig RAM (2 gig recommended)
- 100 MB hard drive space free (200 MB for tutorials)
- Windows 98, NT, 2000, XP, Vista or Windows 7
- 56K modem w/internet connection (for updating)
- Video settings 256 colors or greater
- Internet Explorer 7.0 or greater installed
- CD-ROM

EZAgent installs itself in a folder called EZAgent (the EZAgent folder is installed to the shared drive or folder you choose). EZAgent runs on all popular local area networks (LANs) and supports multiple users when configured properly. Please read copyright notice (page 3) for information regarding using this program on a Wide Area Network (WAN).

### **What you must do:**

You must follow installation procedures precisely, depending on system type and network type (if applicable). A faulty installation will produce negative results and will likely result in loss of data or worse. Qualified technical personnel should do installation.

**NOTE:** DUE TO AN UNLIMITED AMOUNT OF POSSIBILITIES IN THE COMPUTER INDUSTRY, AGENCY SOFTWARE, INC. CANNOT BE HELD RESPONSIBLE FOR LOSS OF DATA UNDER ANY CIRCUMSTANCES. DATA CAN BE LOST OR BECOME CORRUPTED BY MEANS BEYOND OUR CONTROL IF NOT BACKED UP REGULARLY. BACKUPS ARE YOUR RESPONSIBILITY. WE WILL DO ALL WE CAN TO HELP AVOID OR RECOVER FROM SUCH EVENTS, BUT YOU MUST DO THE SAME. REGULAR BACKUPS ARE THE BEST PREVENTION / RECOVERY PROCESS KNOWN. **MAKE SURE YOU DO REGULAR BACKUPS!**

## **To maintain support and updates, you *must* have Internet access**

**NOTE:** YOU HAVE 30 DAYS FROM INSTALLATION OF THIS PROGRAM TO OBTAIN INTERNET ACCESS. IF YOU FAIL TO OBTAIN INTERNET ACCESS, TECHNICAL SUPPORT AND UPDATES WILL BE WITHDRAWN. ALL UPDATES WILL BE AVAILABLE BY INTERNET ACCESS ONLY.

### **How to get technical help when you don't know what to do.**

If you suspect the problem is with your computer hardware or printer or software unrelated to Agency Software programs, seek help from a local tech person. If you feel the problem is related to EZAgent for Windows or other Agency Software programs, call 800-342-7327 or email [support@agencysoftware.com](mailto:support@agencysoftware.com). We respond as quickly as possible considering the current call load, usually within the same day, often within the same hour. If you are hiring outside tech support, **please make an appointment** in advance with one of our tech team to minimize your costs for outside support.

This page is intentionally left blank

## SECTION I: INSTALLATION PROCEDURES

EZAgent for Windows comes only on CD-ROM. A qualified tech person should do the installation following the directions below, with attention given to the current operating system. There are several possible installation procedures, depending on whether or not you have a network, and if so, what type of network. Scan the sections below and pick the one that suits your current network type.

### ***STANDALONE (no network involved)***

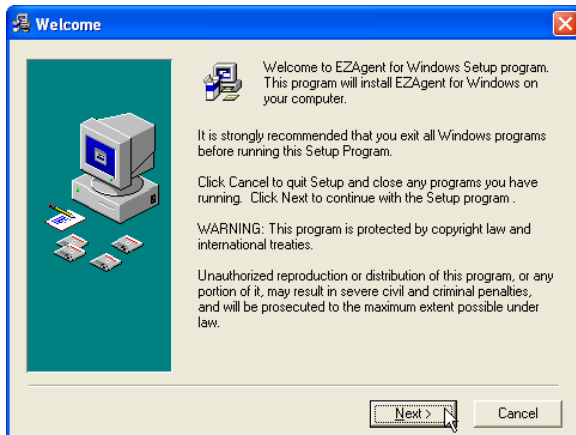
#### **Windows XP/Vista\* and Windows 7\***

\*for best results in Vista and Windows 7, turn User Account Control off at the workstations and server before installation.

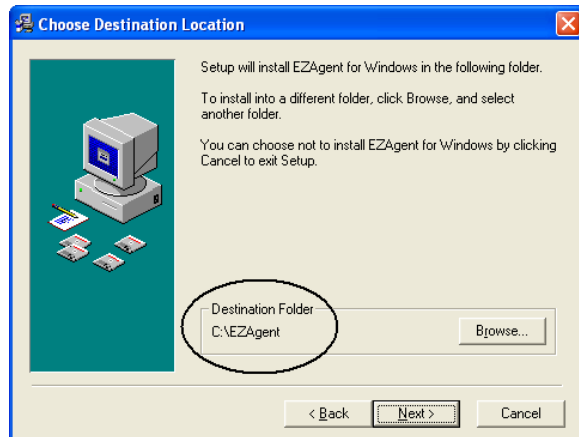
1. Place the EZAgent for Windows CD in the CD-ROM. After a few seconds you will be presented with the Installation window, with the option to install EZAgent for Windows, Browse this CD, or Exit.



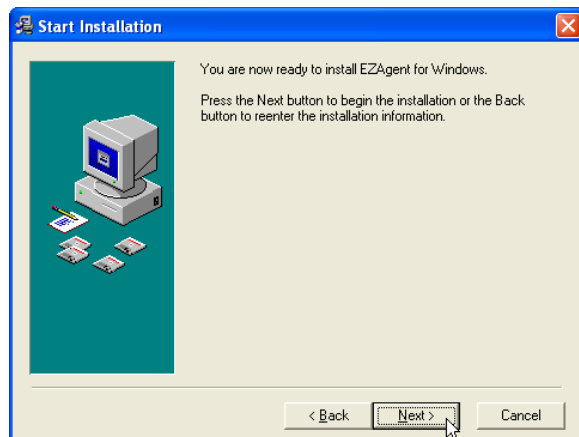
2. Click EZAgent for Windows.
3. In the Welcome screen, click Next.



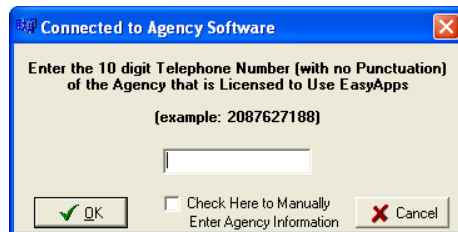
4. In the Choose Destination Location screen, examine where the program will be installed. (Normally this should be C:\EZAgent).



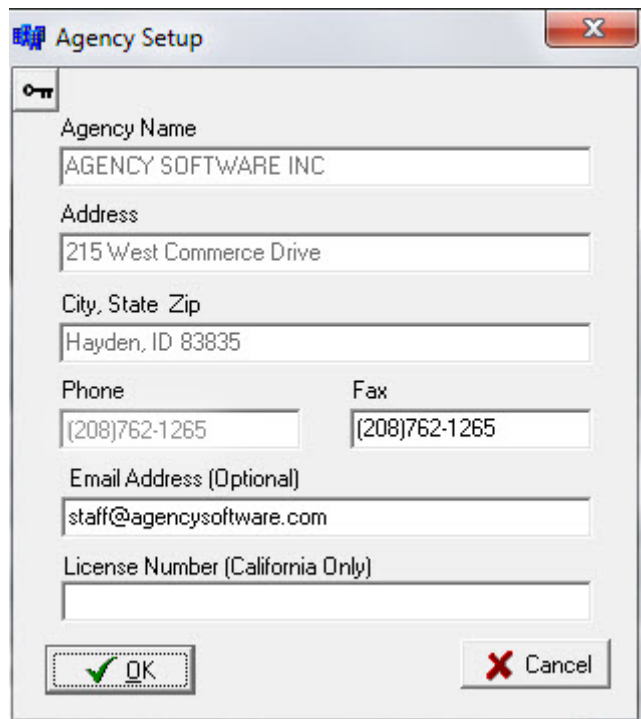
5. If the destination folder is not correct, click the Browse button. In the top box on the next screen type in the correct path (don't try to browse for it). Then click OK to return to the Choose Destination Location screen, and click Next.
6. Make sure you are now connected to the internet.
7. In the Start Installation screen, click Next.



8. Before the installation begins, you'll have to enter your agency telephone number and click OK.



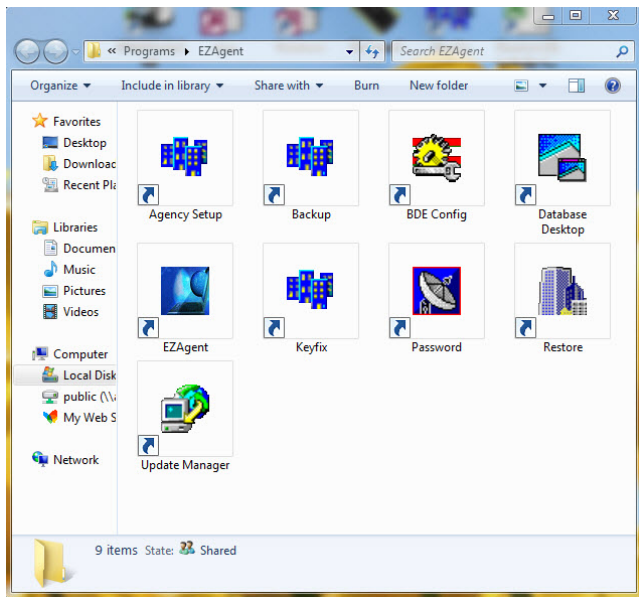
9. EZAgent checks the number with the registered numbers in the Agency Software server), and your agency information appears.
- If you do not see the Connect to Agency Software menu your firewall is blocking it. Please turn off your firewall and try the installation again.



The image shows a Windows-style dialog box titled "Agency Setup". It contains several text input fields for agency information. The fields are: "Agency Name" (containing "AGENCY SOFTWARE INC"), "Address" (containing "215 West Commerce Drive"), "City, State Zip" (containing "Hayden, ID 83835"), "Phone" (containing "(208)762-1265"), "Fax" (containing "(208)762-1265"), "Email Address (Optional)" (containing "staff@agencysoftware.com"), and "License Number (California Only)" (which is empty). At the bottom, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Agency Name	
AGENCY SOFTWARE INC	
Address	
215 West Commerce Drive	
City, State Zip	
Hayden, ID 83835	
Phone	Fax
(208)762-1265	(208)762-1265
Email Address (Optional)	
staff@agencysoftware.com	
License Number (California Only)	
OK	Cancel

10. Review your agency information. If it's incorrect, call Agency Software at 800-342-7327 to change it.
11. The installation begins. This may take several minutes, and may go faster if you temporarily disable your antivirus autoprotect.
12. When the installation is complete, a window of shortcut icons for EZAgent opens. This window can be closed at any time



**These shortcut icons will appear on your Programs menu**

Now click the EXIT line in the initial Installation window and remove the CD.

An EZAgent for Windows icon is created on the desktop.



## NETWORK INSTALLATION

### Setting Up a Dedicated Server

#### Windows XP/Vista\* and Windows 7\*

\*for best results in Vista and Windows 7, turn User Account Control off at the workstations and server before installation.

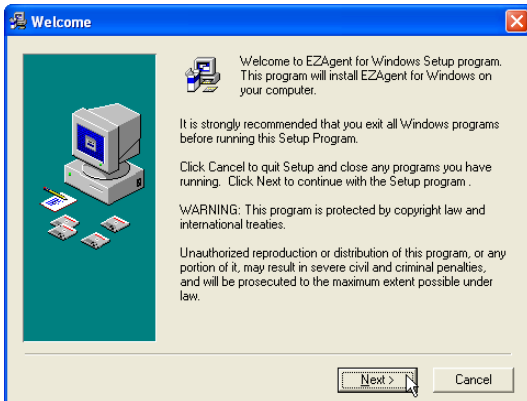
On a dedicated server network, no one ever sits or works at the server. This is the preferred server setup for EZAgent.

(The other server setup is the non-dedicated server, on a 'peer-to-peer' network, in which someone does sit and work at the server.)

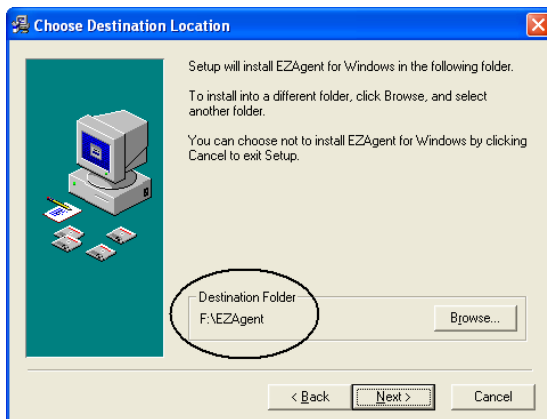
1. Place the EZAgent for Windows CD in the CD-ROM. After a few seconds you will be presented with the Installation window, with the option to install EZAgent for Windows, Browse this CD, or Exit.



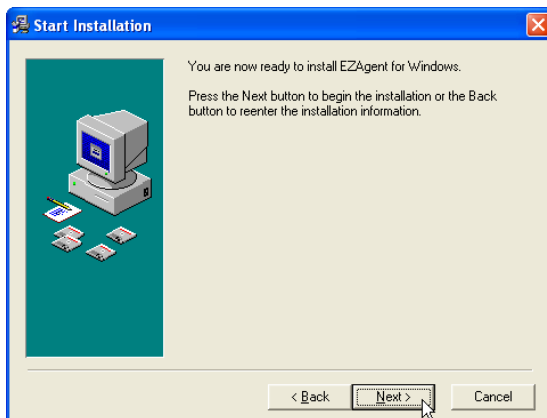
2. Click EZAgent for Windows.
3. In the Welcome screen, click Next.



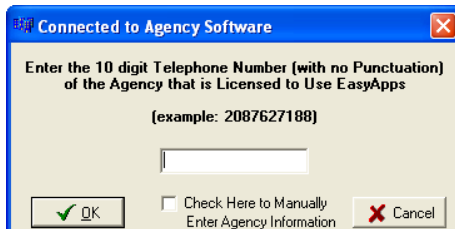
4. In the Choose Destination Location screen, make sure that the Destination Folder is pointing to the shared network drive (e.g., if F:\ is the shared network drive, the destination folder should be **F:\EZAgent**).



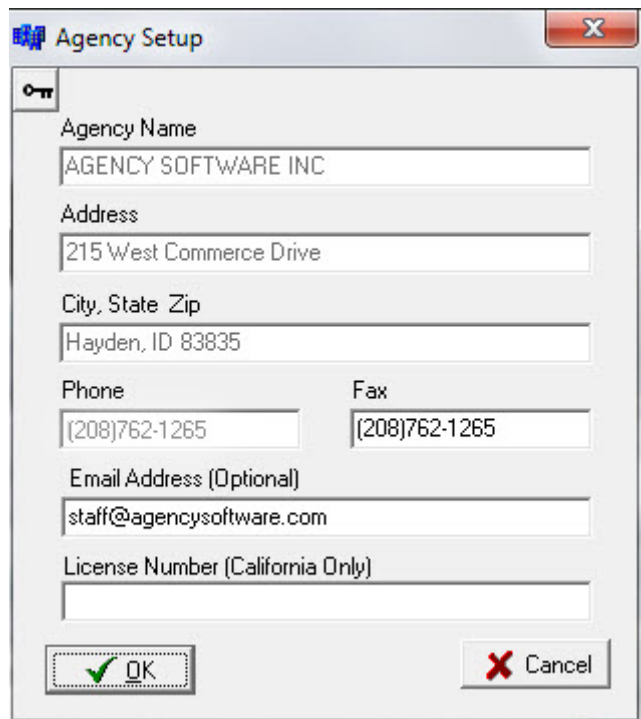
5. If the destination folder is *not* pointing to the network drive, click the Browse button. In the top box on the next screen, *type in the correct path* as shown in the previous paragraph (don't try to browse for it). Then click OK to return to the Choose Destination Location screen (you may be warned that the directory already exists if the EZAgent folder exists on that network drive - click Yes to install to that folder anyway), and then click Next.
6. Make sure you are now connected to the internet.
7. In the Start Installation screen, click Next.



8. Before the installation begins, you'll have to enter your agency telephone number and click OK.



9. EZAgent checks the number with the registered numbers in the Agency Software server), and your agency information appears.
  - If you do not see the Connect to Agency Software menu your firewall is blocking it. Please turn off your firewall and try the installation again.



**Agency Setup**

Agency Name  
AGENCY SOFTWARE INC

Address  
215 West Commerce Drive

City, State Zip  
Hayden, ID 83835

Phone  
(208)762-1265

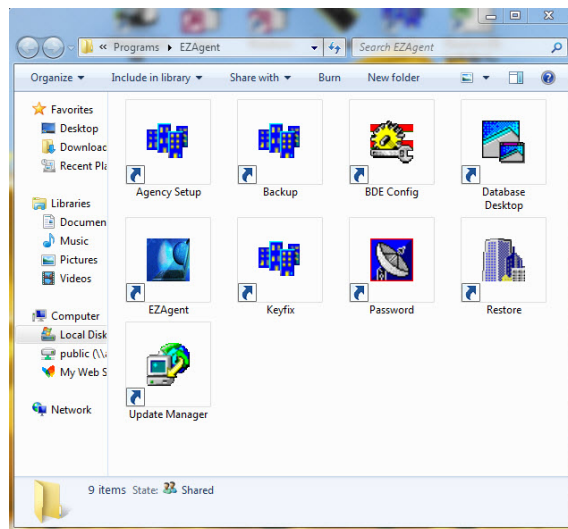
Fax  
(208)762-1265

Email Address (Optional)  
staff@agencysoftware.com

License Number (California Only)

OK Cancel

10. Review your agency information. If it's incorrect, call Agency Software at 800-342-7327 to change it.
11. The installation begins. This may take several minutes, and may go faster if you temporarily disable your antivirus autoprotect.
12. When the installation is complete, a window of shortcut icons for EZAgent opens. This window can be closed at any time.



**These shortcut icons will appear on your Programs menu**

Now click the EXIT line in the initial Installation window and remove the CD.

An EZAgent for Windows icon is created on the desktop.



Follow the instructions in the Setting Up the Workstations section to map and setup the workstations to use the database you just installed.

## Setting Up a Non-Dedicated Server

### Windows XP/Vista\* and Windows 7\*

\*for best results in Vista and Windows 7, turn User Account Control off at the workstations and server before installation.

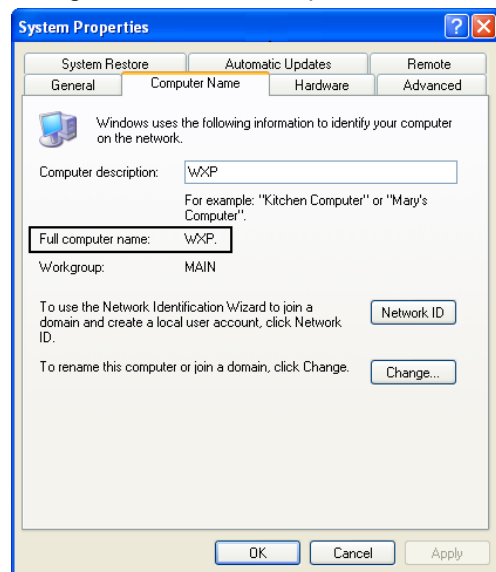
In a non-dedicated server setup, someone sits and works in EZAgent at the server machine. This is not the recommended setup for EZAgent and should only be configured with the help of Technical Support. This must be configured before you install EZAgent.

Before you install the program, you must map a network drive letter with an *identical path* on every machine in the network. The instructions below are for mapping a non-dedicated server to itself (i.e., mapping a network drive letter in the server to the C:\ drive, or a shared folder on the C:\ drive, in the server). All of these instructions assume that you are mapping the drive letter F:\. If you want to map a different drive letter, substitute your chosen drive letter wherever you see F:\.

### Mapping a Drive Letter in a Windows XP Non-Dedicated Server

First, get the Full Computer Name of the server machine.

To find the Full Computer Name in Windows XP, right-click the My Computer icon in the server machine and click Properties. In the System Properties dialog box, click the Computer Name tab. You want the Full Computer Name (*not the Computer Description*) without the period that follows it.



In Windows 2000, you'll find the Full Computer Name on the Network Identification tab in the System Properties dialog box.

Next, go to the workstation where you want to map a network drive:

1. Click with the right mouse button on the My Computer icon.
2. Select Map Network Drive.

3. Open the list in the Drive box and select the network drive letter you want to use (for example, F:).
  4. In the Folder box, type the path to the drive where you will install EZAgent (e.g., if you are going to install the database to the C:\ drive on the computer named Frontdesk, you would enter **\\frontdesk\C** ).  
**Note:** If you are going to install in a shared folder (e.g., a folder named Apps) instead of the C: drive, you would type **\\frontdesk\\apps** in the Folder box.
  5. Click Finish. A window to the new mapped drive opens, and it reads F:\ in the window's title bar.
- Close the window. You are ready to install the EZAgent software to the F:\ drive that you just mapped.

## ***Program Installation at the Non-Dedicated Server***

Follow the instructions for installing to a dedicated server (above).

In the Choose Destination Location screen (step 4), make sure that the Destination Folder is pointing to the mapped network drive (e.g., if F:\ is the mapped network drive, the destination folder should be **F:\EZAgent**).

When the installation is complete, remove the CD and then follow the next section's procedures to set up EZAgent at all workstations.

## ***Setting Up the Workstations for either a Dedicated Server or Peer-to-Peer Network***

### **Mapping the Drive on Workstations**

*Mapping a drive* means you create a new drive icon in the workstation that connects to the shared drive or folder on the server. For example, a mapped drive letter might be Q or F or Z. You cannot use the letter C (which is usually the local hard drive in the workstation) or any other letter already assigned to the CD-ROM or Floppy Disk or a second hard drive in any workstation.

**TIP: For simplicity and convenience, choose a mapped drive letter that's near the end of the alphabet, and map the same drive letter at every workstation.**

These procedures illustrate mapping the drive letter F, and the rest of the installation procedures will use the F drive as the example. If your mapped drive letter is different, use your mapped drive letter instead.

### **Mapping a drive letter on Windows XP/Vista and 7**

1. First, you need to know the full computer name of the server.
  - a. At the server, right-click the My Computer icon and click Properties.  
In Windows XP, the Full Computer Name is found on the Computer Name tab.  
In Windows 2000, the Full Computer Name is found on the Network Identification tab.
  - b. Write it down – spelling counts – then click Cancel to close the System Properties dialog box.
2. At a workstation, right-click the My Computer icon, and click Map Network Drive.
3. In the Map Network Drive dialog box, click the arrow on the right side of the Drive box, and select your chosen mapped drive letter.
4. In the Folder box, type the path to the shared drive or folder in this format:  
    \\servername\C (to map to the shared drive C on the server)  
    \\servername\foldername (to map to a shared folder on drive C on the server)  
Be sure you use the correct server computer name (which you found in step 1) and the correct shared drive or folder name.

**\*\*\*Do NOT map a drive letter directly to the EZAGENT folder\*\*\***

Instead, create another folder (such as Apps) on the C: drive, install EZAgent into that folder, and map the drive letters to C:\Apps\EZAgent.

5. Click the Finish button. If you get no errors, then your drive mapping is complete.

When you finish, a folder window opened to your new mapped drive letter opens. The mapped drive letter appears in the window's title bar. You may close the window.

6. Double-click the My Computer icon. You should see the mapped drive letter in the My Computer window. You'll see the shared drive/folder name, the computer name, and the mapped drive letter in parentheses – e.g., *C on servername (F)*. When you double-click on the mapped drive's icon, the shared drive which you mapped will open.

## Installing the Program at Workstations

1. Double-click the My Computer icon in the workstation.
2. Double-click the mapped network drive letter where EZAgent is installed.
3. Double-click the EZAgent folder.
4. Double-click the file name **setupws.exe**. (That's setupws, *not* setupw).
5. Click Next in all the dialog boxes.

When the workstation setup is complete, a window of EZAgent icons appears on your desktop. You can close this window at any time.

6. Close the My Computer window you opened in Step 1.

You are now ready to run the program from the workstation by double-clicking on the EZAgent icon on your desktop.

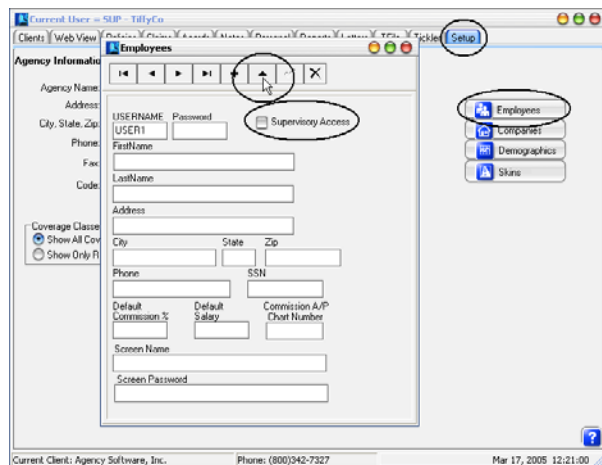
When you open EZAgent on a workstation, you are opening the database that you installed on the server. If the workstations were set up correctly, multiple users can open the database at multiple workstations at the same time, and all will see the same data.

## Your First Login

When the login Screen comes up for the first time, enter the Username **SUP** and the Password **SUPER**.



When EZAgent opens, click the Setup tab and click the Employees button. In addition to SUP, you'll have five employee names entered– User 1 through User 5. **Do not delete any of these employees** – instead, edit each employee to change the name and password to a user.



See the Setup Window section to learn more about adding and editing employees.

**Tip:** Don't change the SUP name until you've changed all the others – that way you'll always be able to login with SUP and SUPER even if you can't remember a user's name and password.

## SECTION II: HINTS & TIPS

Check out these techniques to quickly master navigation of EZAgent for Windows, and for the most efficient ways to do things.

## Navigation

EZAgent uses common Windows navigation techniques and keystrokes, which allow you to move around within EZAgent with great ease. Understanding and using these features will make your job much easier, speed up your work, and make using this program a pleasure.

## Help Files

Help Files for many subjects are available. When you're working in EZAgent, no matter what tab (window) you have open, you can always press F1 to get help on that subject. The Help Files contain Hints & Tips, a comprehensive Index, and Help files for all main topics, although a few are limited in their scope. Improved Help Files will be made available with most updates. In the Help Files, click on green underlined text to go straight to that main or sub-topic.

## List Boxes



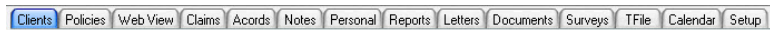
You'll find many list boxes with dropdown arrows that allow you to open a list and select an entry.

## Scroll Bars



Scroll Bars appear at the right side and bottom of lists. Scrolling up, down, right, or left will bring more entries into view.

## Window Tabs



Click on a tab to open that window. If you can't see all the tabs, either make the EZAgent window wider, or click the arrow buttons at the right end of the tabs to scroll and display the hidden tabs at each end.

## Toolbars

Many windows, and all ACORD forms, have Toolbars for your convenience. Learn what each button does and use them to save time.



When you point your mouse at a specific button, a screentip with the button's name appears – this will help you figure out which button does what.

## Sort By Heading

In most tables and lists, if you click on a column heading (such as Num or Date), the list or table will be sorted by the entries in that column.

NAME	NAME2	TYPE	FIRSTNAME
AQUARIUS SPRINKLERS	Rain Bird Hunter	Garden and Lawn	John
MARKO'S EVERGREEN SPRINKLERS, INC.		Garden and Lawn	Mark
GRIZZLY GLASS		Glass-Automobile Repair	Chip
AVONDALE GOLF AND TENNIS CLUB		Golf Course	Bobby
BIRDIES GOLF CENTER		Golf Course	Arnold
GONZO'S GUITARS		Guitar Sales	Jerry
GUNARAMA WHOLESALE INC.		Gun Wholesaler	Doc
A & O HEATING/AIR CONDITIONING		Heating Contractors	Paul

Also, when you click a column heading to sort, the sorted column is colored (so that you can tell at a glance which column the table is sorted by).

## SECTION III: EZAgent For Windows Features

### *The Clients Window*

The Clients window is where you enter client information, such as client name, address, and phone numbers. EZAgent always opens with the Clients window displayed. The client names are listed on the right side of the window, in the names list, and the data for the selected client is displayed on the left side of the window. To open the Clients window from any other window in EZAgent, click on the **Clients** tab at the top of the program window.

The status bar at the bottom of the EZAgent program window always indicates the selected client name, their phone number, and the current date and time.

In the name list, columns other than the name column can be displayed by scrolling to the right in the horizontal scroll bar below the list.

Current User = SUPER - AGENCY SOFTWARE INC

**Clients** Policies Web View Claims Accords Notes Old Notes Personal Reports Letters Documents Surveys TFile Calendar Setup

Client Name  
2 GUYS BARBER SHOP

Name 2

Type  
Barber Shop

Contact's First Name Contact's Last Name  
Edward Schilling

Address 1  
993 Elm Street

Address 2

City State Zip  
Winthrop WA 93811

Home Phone  
(509)687-2223

Office Phone  
(509)687-2222

Fax/Cell Phone  
(509)687-2221

Email Address  
dehaiem@dmf.net

Assigned Producer  
Rodney Walter

Assigned CSR  
CMR

Status  
ACTIVE

Client ID  
000031

NAME  
\*\*\* SAMPLE CLIENT \*\*\*  
2 GUYS BARBER SHOP  
24 KARATE NAILS  
3 AMIGOS MEXICAN RESTAURANT  
A & O HEATING/AIR CONDITIONING  
A-CORE OF WASHINGTON  
ABC CONSTRUCTION  
AD CONCEPTS  
ADRIAN KYLE  
AGENCY SOFTWARE INC  
AIR FLOW SYSTEMS INC  
ALL WESTERN INDUSTRIAL SUPPLY CO  
ALLEN CONRAD  
ALLEN OGDEN  
ALLISON COMPANY  
ALLWRIGHT CONCRETE  
AMERICAN UNFINISHED FURNITURE  
ANNA OGDEN  
AQUARIUS SPRINKLERS  
ROSS CHRISTENSEN  
TIFFYCO INSURANCE

Current Client: 2 GUYS BARBER SHOP Phone: (509)687-2223 Apr 27, 2010 1:24:26 PM

### Adding a Client

To add a client, click the + button above the client list. The client information fields on the left side of the window are emptied so that a new client's information can be typed into the appropriate fields. You can use your Tab key to move between fields while entering client information, or you can click in the field where you want to enter data.

After all of the client's information has been entered, click on the ✓ button to save the information.

### Editing Client Information

To edit client data, select the client's name in the names list on the right (click the client name to select it), and then click on the ▲ button to open that client's record for editing. The selected client's information appears on the left side of the window. Edit the data, and save your changes by clicking on the ✓ button.

## Deleting a Client










To delete a client, click the client's name in the names list on the right, then click the **X** button. Click Yes in the Delete This Client? message. That client's data and forms are permanently removed from the database.





### The Clients Toolbar



When you position the mouse over a specific button on the toolbar, the name of that button will appear in a screentip.

The buttons, left to right, are:

	<b>First Record</b> Selects the client name at the top of the list.
	<b>Prior Record</b> Selects the next client above the selected client.
	<b>Next Record</b> Selects the next client below the selected client.
	<b>Last Record</b> Selects the client at the bottom of the client list.
	<b>Insert Record</b> Creates a new client record, ready for data entry. Click the Post Edit button to finish and save the new client record.
	<b>Edit Record</b> Select the client that you want to edit in the names list, then click this button to edit the fields on the left. When done, click the Post Edit button to save the changes.
	<b>Post Edit</b> Permanently posts the change to the database while adding or editing a client's record.
	<b>Refresh Data</b> Refreshes your Clients window to show new client data entered at other workstations on the network.
	<b>Delete Client</b> Select the client you want to delete from the list on the right, and then click this button to delete the client. All entries in all modules for that client will be deleted from your system. A confirmation box will appear before the client can actually be deleted. <b>Note:</b> This button is only displayed to users with Supervisory access.

	<b>Filter Client Database</b> Click on the magnifying glass button to clear all fields on the left. Type in your search criteria in any fields, and then click the Filter Client Database button again. The client list will be filtered to show only those clients who match your search criteria.
	<b>Restore Client List</b> Restore the full client list after filtering.
	<b>Sticky Note</b> – This button allows you to attach a pop-up note to your client's file. You can change the color and priority of your sticky notes.
	<b>Show Help</b> This button will start the tutorial for the current window if you have the EZAgent CD in your CD-ROM drive, or if you have loaded the tutorials to your hard drive. If the tutorials are not available, Windows Help Files will appear instead.

**Tip:** Instead of scrolling down to find a client in a long list, you can jump to a specific area in the clients list by pressing a key (or two or three) on your keyboard. For example, suppose you want to find a client whose name is listed as Longhorn Barbecue. To jump to the first name that begins with the letters LON, click in the clients list, and then type LON on your keyboard.

## Using Outlook with EZAgent

If you have customer data in your Outlook Contacts folder, you can easily transfer them into the EZAgent Clients window by saving them as vCards and then dragging and dropping the vCards from the My Documents folder (where vCards are saved by default) onto the EZAgent desktop icon.

**Note:** EZAgent must be closed when you drag and drop vCards onto the icon.

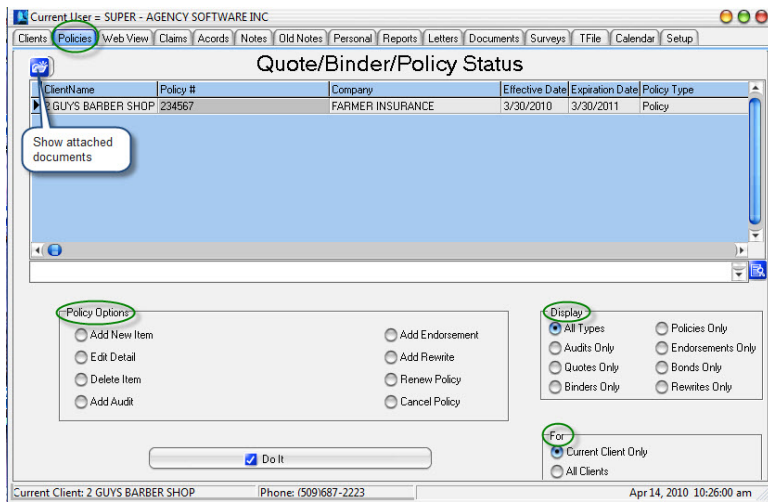
To save an Outlook contact as a vCard:

1. Select the contact in Outlook and click File – Save As.
2. In the Save As dialog box, in the Save As Type box, select vCard Files (\*.vcf).
3. Click Save.

Open the folder where the vCard is saved and drag each vCard icon onto the EZAgent icon, one at a time. You'll be asked to login, and EZAgent opens. You'll see the contact has been added to the Clients list in EZAgent.

## *The Policies Window*

On the Clients window, choose the customer or add the customer for whom you want to enter or edit a policy. Then click on the Policies tab to open the Policies window. The Policies window serves as a database for Quote/Binder/Policy Status.



## Policy Options

1. **Add New Item** Add a quote/binder/policy/endorsement
2. **Edit Detail** Edit the details of a selected quote/binder/policy/endorsement
3. **Delete Item** Delete the selected quote/binder/policy/endorsement
4. **Add Audit** Create a new audit
5. **Add Endorsement** Create a new endorsement
6. **Renew Policy** Renew the selected policy
7. **Add Rewrite** Add a policy rewrite
8. **Cancel Policy** Cancel the selected policy

## Display Options

1. **All Types** Displays quotes, binders, policies, and endorsements
2. **Audits Only** Displays audits only
3. **Quotes Only** Displays quotes only
4. **Binders Only** Displays binders only
5. **Policies Only** Displays policies only
6. **Bonds Only** Displays bonds only
7. **Endorsements** Displays endorsements only
8. **Rewrites Only** Displays rewrites only

## For Options

These options filter the list to display only the policies for the current client (selected in the Clients window), or all the policies for all the clients in the database.

**Note:** You can only create a new policy, quote, binder, or endorsement if the Display – All Types option and the For – Current Client Only option are both selected.


After you select a Policy option, click the **Do It** button to proceed.

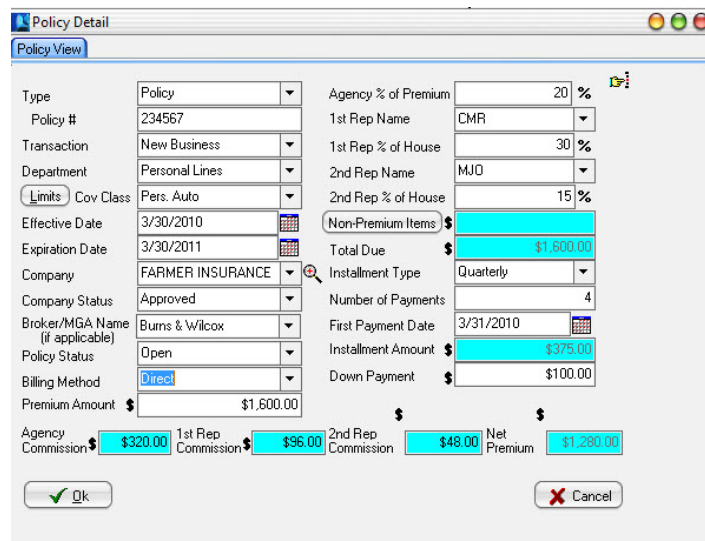
## Additional Details for Using the Policies Window

You'll find procedures for working with policies in the following sections.

### Add A New Policy

When you choose Add New Item from the Policy Window and click the **Do It** button, the Policy Detail screen is displayed. Start in the upper-left corner and proceed from top to bottom down the left column, then top to bottom down the right side as you fill in the blanks (follow the detailed instructions in the next section for each field).

Many fields can be filled by selecting an entry from the dropdown list. When you see a down arrow  on the right end of a box, click it to open a list of choices, then click the entry you want in the list.



The screenshot shows the 'Policy Detail' window with a 'Policy View' tab. The form is divided into two main columns. The left column contains fields for Type (Policy), Policy # (234567), Transaction (New Business), Department (Personal Lines), Limits (button), Cov Class (Pers. Auto), Effective Date (3/30/2010), Expiration Date (3/30/2011), Company (FARMER INSURANCE), Company Status (Approved), Broker/MGA Name (Burns & Wilcox), Policy Status (Open), Billing Method (Direct), and Premium Amount (\$1,600.00). The right column contains Agency % of Premium (20%), 1st Rep Name (CMR), 1st Rep % of House (30%), 2nd Rep Name (MJO), 2nd Rep % of House (15%), Non-Premium Items (button), Total Due (\$1,600.00), Installment Type (Quarterly), Number of Payments (4), First Payment Date (3/31/2010), Installment Amount (\$375.00), and Down Payment (\$100.00). At the bottom, there is a summary section with Agency Commission (\$320.00), 1st Rep Commission (\$96.00), 2nd Rep Commission (\$48.00), and Net Premium (\$1,280.00). The bottom of the window has 'Ok' and 'Cancel' buttons.

**Blue Fields** The blue fields are automatically calculated – you cannot enter data in these fields.

### Field by Field – What you should do on the left side of the Policy Detail window

1. **Type** Choose Policy in the dropdown list.
2. **Policy #** Type the Policy Number.
3. **Transaction** Choose your entry from the list.
4. **Department** Choose your entry from the list.
9. **Limits Button** Opens the Coverages window (see Coverages section).

5. **Coverage Class** Choose your entry from the list.
6. **Effective Date** Click the button on the right. A calendar appears with the current date selected. Click OK to accept that date, or click to select a different date and then click OK.
7. **Expiration Date** Click the button on the right. A calendar appears with the date one year from the effective date selected. Click OK to accept that date, or select a different date and then click OK.
8. **Company** Choose your entry from the list. (The button to the right of the dropdown box opens the Company Database for entering or editing the companies in this list but only if you have Supervisory access in the EZAgent database).
9. **Company Status** Choose your entry from the list.
10. **Broker/MGA Name** Choose your entry from the list if business is placed through a Broker or MGA. This will not override the Company on Acord forms.  
To add Broker/MGA, click on the magnifying glass to the right of the Company line. After adding the Broker/MGA in Company detail, check the box for Broker or MGA.
11. **Policy Status** Choose your entry from the list.
12. **Billing Method** The entry defaults from the Company Setup database, but you can change it by selecting a different entry in the list.
13. **Premium Amount** Type the Premium amount.

#### **Field by Field – What you should do on the right side of the Policy Detail window**

1. **Agency % of Premium** Pre-defined in Company Setup, but can be changed if needed.
2. **1<sup>st</sup> Rep Name** Choose your entry from the list. The list comes from the Employees database in the Setup tab, and can only be changed there.
3. **1<sup>st</sup> Rep % of House** Pre-defined in Employee Setup, but can be changed if needed.
4. **2<sup>nd</sup> Rep Name** Choose your entry from the list. The list comes from the Employees database in the Setup tab, and can only be changed there.
5. **2<sup>nd</sup> Rep % of House** Pre-defined in Employee Setup, but can be changed if needed.
6. **Non-Premium Items** A special area. Click the button to add Non-Premium Items. Once added, the blue field will auto-calculate.
7. **Total Due** Auto-Calculate field.
8. **Installment Type** Choose your entry from the list.
9. **Number of Payments** Auto-Calculates from Installment Type.
10. **First Payment Date** Click the button on the right. A calendar appears with the current date selected. Click OK, or select another date and then click OK.
11. **Installment Amount** Auto-Calculate field.
12. **Down Payment** Type the Down Payment amount.
13. **Agency Commission** Auto-Calculate field.
14. **1<sup>st</sup> Rep Commission** Auto-Calculate field.
15. **2<sup>nd</sup> Rep Commission** Auto-Calculate field.
16. **Net Premium** - Auto-Calculate field.

When you're done, click OK to save your entries. This record will be added to the current client.

## Coverages

The Limits window is where the coverages for the client's policy are entered. To open this window, click the Limits button left of the Cov Class box on the policy detail screen. Information entered in the Limits window can prefill into your ACORD forms, if you have the Acord Forms option installed in EZAgent.

Class	Coverage	Limit	Deductible	Notes
GENERAL LIABILITY	Additional Persons Insured	100,000	250	

There are five fields in the Limits window:

### Class

This specifies which class of coverage you are going to use. It also specifies the types of forms into which the information can prefill. To select a coverage class, click in the Class box, then click on the down arrow that appears in the box, and then select the appropriate type. You will have to select a class for each line item entered.

### Coverage

The choices that appear in this dropdown list are filtered depending on what Class you have selected in the Class field. To select a coverage type, click in the Coverage box, then click on the down arrow that appears in the box, and then select the appropriate type.

### Limit

Enter the amount of the limits for the selected coverage.

### Deductible


You can enter a deductible amount, or you can leave this field blank.

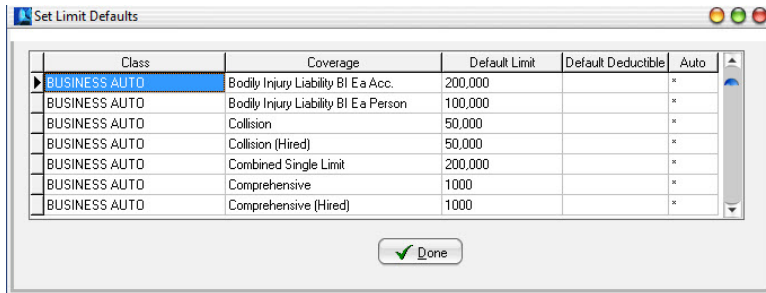
When you're done entering coverages, click OK to save your entries. This record will be added to the current client policy.

### Notes

The horizontal box below the Policies list allows you to enter any additional notes about the selected policy. You can enter notes directly in that box, or you can click the button at the right end of the box to open a much larger box for entering as many notes of any length as you need. When you click the Notes button again to close the large Notes box, the small Notes box displays only the first line of Notes.

## Setting Default Limits

Setting up agency wide default limits saves you time. Click on the  icon in the upper right hand corner of the Limits Screen. Type in your desired default limits and then hit your space bar in the auto column to create your defaults.



The 'Set Limit Defaults' window displays a table with columns: Class, Coverage, Default Limit, Default Deductible, and Auto. The 'BUSINESS AUTO' class is selected, showing various coverage options and their default limits and deductibles. A 'Done' button is at the bottom.

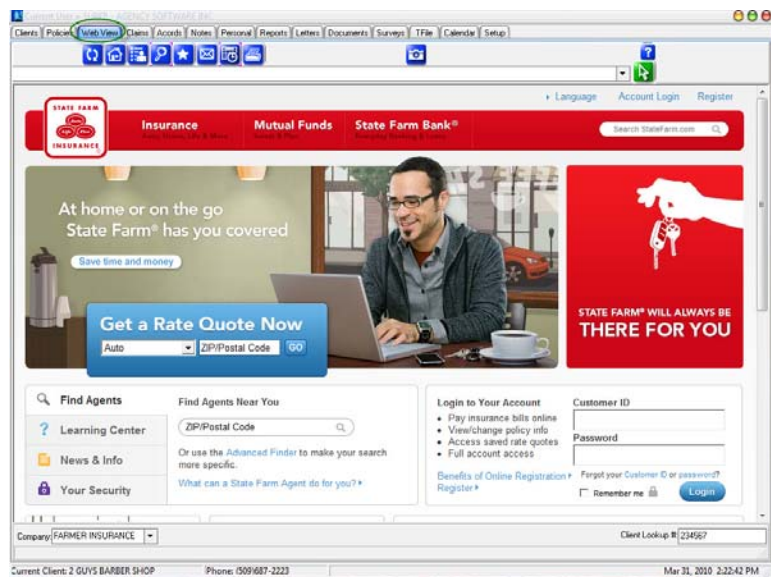
Class	Coverage	Default Limit	Default Deductible	Auto
BUSINESS AUTO	Bodily Injury Liability BI Ea Acc.	200,000		*
BUSINESS AUTO	Bodily Injury Liability BI Ea Person	100,000		*
BUSINESS AUTO	Collision	50,000		*
BUSINESS AUTO	Collision (Hired)	50,000		*
BUSINESS AUTO	Combined Single Limit	200,000		*
BUSINESS AUTO	Comprehensive	1000		*
BUSINESS AUTO	Comprehensive (Hired)	1000		*

Done

## The Web View Window

The Web View window is where EZAgent makes your work much easier. The Web View window:

- Opens the web page of your current client's insurance company or you can select a different company.
- Logs you in automatically.
- Finds the client you have currently selected in your Clients window, if they are already an insured with that company.
- Allows you to take a snapshot of any document and attach it to your client at the documents tab.



## How to Use the Web View Window

The Web View window works most efficiently when you have the insurance company and their web page URL entered in the Companies form in the Setup window, and you have your login name and password for that company web page entered in the Database. See the Setup Window section to learn more.

1. Select your client in the Clients window by clicking their name.

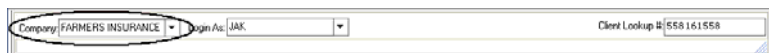
The client data appears on the left side of the Clients window and the client name appears in the lower-left corner of the EZAgent program window.

**Note:** If the client you are looking up at the web site is not in your EZAgent database yet, you can look them up by typing either their policy number or name in the web page client lookup box after you are logged in at the company web site, as explained in step 4.


2. Select the policy you are working on in the policy tab and click the Web View tab.

The Web View window opens the web page for the first policy you selected in the policy tab

If you want to open a different company's web page, select the company name from the Company list box in the lower-left corner of the Web View window. **Note:** Only companies with URLs entered in the Setup window's Companies form appear in this list.



The company name is displayed in the Company list box. Your user name is displayed in the Login As box. The Client Lookup # box displays the selected client's first policy number, or the client name if they have no policies in EZAgent yet.

3. If your EZAgent Employee form has the appropriate name and password entered in the User Password Setup  in the Employee section on the Setup tab, the Web View window automatically logs you in at the company site. (See Employee Information Database for detailed instructions.)

If your EZAgent Employee form does not have a Screen Name and Screen Password entered, or does not have the appropriate Screen Name and Screen Password for the web site you opened, you can enter your login name and password yourself and log in to the company web page.














4. The selected client is automatically looked up in the company web page using the policy number in the EZAgent Policies window.

### The Web View Toolbar



When you position the mouse over a specific button on the toolbar, the name of that button appears in a screentip.

The buttons, left to right, are:

	<b>Back</b> Opens the previous web page
	<b>Forward</b> Opens the next web page you opened
	<b>Stop</b> Stops all web page activity
	<b>Refresh</b> Refreshes the current page with current data
	<b>Home</b> Opens the company web site Home page
	<b>Search</b> Opens the Google search page
	<b>Favorites</b> Opens the Favorites folder
	<b>E-mail</b> Opens an EZAgent e-mail message, addressed to the current client, that uses your e-mail program to send
	<b>Calendar</b> Opens Outlook
	<b>Print</b> Opens the Print dialog box so you can print the page to the printer you choose
	<b>Close Current Window</b>
	<b>Attach Screen Shot to Document's Tab</b>
	<b>Help and Tutorial</b> If the EZAgent CD is in your drive, the tutorial for the Web Page window plays - if the CD is not in the drive, a help file opens

Beneath the Web View toolbar is a standard browser Address bar with a Go button on the right end. You can type any URL in the Address bar and click Go to open that web page, and then use the Web View toolbar's Back and Forward buttons to move between all the pages you've opened.

## The Claims Window

Click the Claims tab to open the Claims window. Use the Claims window to keep records of the selected client's claims. Remember to select the client in the Clients window.

The screenshot shows the 'Claims History' window. At the top, there's a menu bar with options: Clients, Policies, Web View, Claims (selected), Accords, Notes, Old Notes, Personal, Reports, Letters, Documents, Surveys, TFile, Calendar, and Setup. Below the menu is a table titled 'Claims History' with columns: Type, Policy #, Claim #, Date of Loss, Report Date, Reserve Amount, Amount Paid, and Co. The table contains one row: collision, 234567 - Pers. Auto, 111, 4/14/2010, 4/14/2010, and FA. Below the table is a 'Claims Options' section with three radio buttons: 'Add New Claim' (selected), 'Edit Claim', and 'Delete Claim'. At the bottom of this section is a 'Do It' button. The status bar at the bottom of the window shows 'Current Client: 2 GUYS BARBER SHOP', 'Phone: (509)687-2223', and 'Apr 14, 2010 12:41:30 PM'.

- **Add a New Claim.** The current customer's name is shown at the bottom of the window. Click the Add New Claim option, then click Do It.

The screenshot shows the 'Claim Detail' window. It has a 'Claim Open' checkbox at the top. Below it are several input fields: 'Claim Number' (111), 'Type of Loss' (collision), 'Date of Loss' (3/23/2005), 'Report Date' (3/23/2005), 'Policy Number' (123456), 'Company' (FARMERS INSURANCE), 'Adjuster Name' (Mick Abruzzo), 'Adjuster Phone' (800-555-5555), 'Reserve Amount', and 'Amount Paid'. There is also a 'Facts' text area containing the text 'Rear-ended when a vehicle behind him ran a red light'. At the bottom are 'OK' and 'Cancel' buttons.

On the claim entry screen, enter a Claim number. Click the down arrow in the Policy Number box, and choose a policy number from the list. When you choose the policy number, the Company information for that policy will prefill in the Claim Detail window. Enter the appropriate data in any remaining fields, and click the check mark to post/save, then OK to close the window.

- **Edit a Claim.** Select the claim you want to edit, then click the Edit Claim option and click Do it. In the Claim Detail window, make your changes and click OK.
- **Delete a Claim.** Select the claim you want to delete, then click the Delete Claim option and click Do It. When asked if you are sure, click Yes (unless you change your mind – then click No).

## The Acords Window

Click on the Acords tab to open the Acords window. The Acords window contains all the ACORD forms for the selected client, and allows you to add, edit, or delete forms for that client. The forms list is blank until you add forms for that client.

The data in the Create Date column is automatic – you cannot change it. You can type short notes about specific forms by clicking in the Note column for that form and typing your entry.

CREATE DATE	FORM NAME	POLICY NUMBER	NOTE	FORM NUMBER	FOR
1/19/2010	CERT. OF LIAB. INS. (2009/09)	234567		000003	CEF
1/19/2010	EQUIP. FLOATER SECTION	234567		000001	EQF

ACORD Options:

- ☒ Add New Form
- ☐ Edit Client's Form
- ☐ Delete Client's Form
- ☐ Duplicate Client's Form
- ☐ Mark Forms for Mass Print
- ☐ Print Mass Marked Forms
- ☐ Move Forms to Diskette
- ☐ Read Forms from Diskette

☒ Do It

Current Client: 2 GUYS BARBER SHOP Phone: (509)687-2223 Apr 14, 2010 12:47:02 PM

### ACORD Options

This section explains the various options in the lower pane of the Acord window.

### Add New Form

When you select the Add New Form option and click the “Do It” button, the Add New ACORD Forms window (shown below) appears. This window displays all available ACORD forms in alphabetical order.

This list is first-key sensitive – to jump quickly to a specific point in the alphabetical list, you only need to press a letter key on your keyboard. For instance, if you need to add a Workers Comp form, press “W” on your keyboard. The first form starting with W is selected. You may then scroll down, page down, or arrow down to the Workers Comp form. Select the form you want, and click OK to open the form.

ACORD Name	Revision Date	Number	State
ACCOUNTS REC/VAL PAPERS	2004/03	145	
ACORD GENERIC ID (1/83)	1/83	50	
ACORD GENERIC ID 2/95 WM(1-UP)	2/95	50WM	
ACORD GENERIC ID 2/95 WM(4-UP)	2/95	50WM	
ACORD GENERIC PERSONL AUTO APP	2/95	90	
ADDITIONAL INTEREST	2003/04	45	
AGENT/BROKER RECORD OF CHANGE	1/98	36	

Filter to:

☒ Country Wide

☐ All ACORD's

☐ State Specific

OK Cancel

Use the options below the list to filter from all ACORD forms to a more manageable list.

- The Country Wide option filters the list to display all the forms that are NOT state-specific.
- The State Specific option filters the list to show just the forms that are specific to a particular state (after you select the State Specific option, select the state you want in the list box that appears to the right).
- The All Acords option removes the filters and displays the entire list of ACORD forms.

After selecting a form, you'll be asked which policy you would like to prefill from. The Coverages sections of the policy, as well as some other policy information, *may* be prefilled in the form, depending on what type of form you have selected. In addition, selecting a policy from this window will allow you to keep all of the ACORD forms for one policy separate from similar ACORD forms for different policies.

After you open a form, refer to the sections The Formview Window and The Formview Toolbar, below, for more information.

## Edit Client's Form

Edit an existing ACORD form for the current client. Select a form from the list of existing forms, select Edit Client's Form, and then click "Do It." You can also double-click the form in the list. The selected form appears and you may edit as needed.

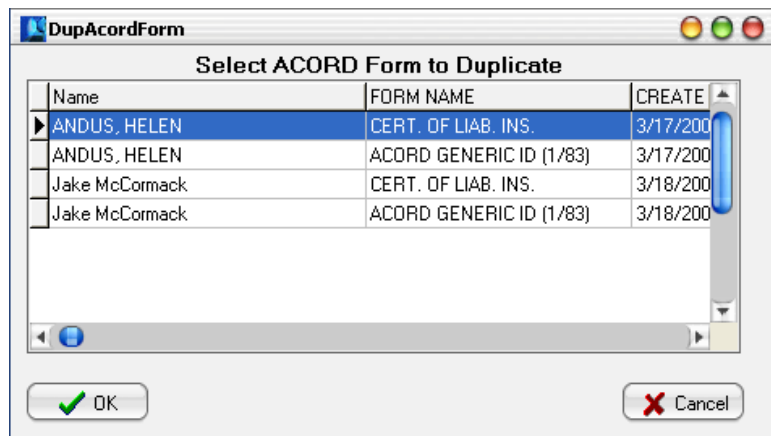
## Delete Client's Form

Delete an existing ACORD form for the current client. Select a form from the list of existing forms, select Delete Client's Form, and then click "Do It." You will be prompted if this is what you really want to do. The selected form is deleted from the current client.

## Duplicate Client's Form

If you wish to create an exact duplicate of a different client's ACORD form for the client you have selected, click on the Acords tab and then select "Duplicate Client's Form." The DupAcordForm dialog box opens with a list of all the clients in the database and all their forms.

1. Scroll down to select the client and the form you wish to duplicate for the open client. You can often find the form you want more easily if you sort the list by Name or Form Name or Create Date (by clicking on the appropriate column heading).
2. After you select the form you want to duplicate, click OK.



Another good use the Duplicate Client's Form option is when it's time to renew a client's form for the new year. You can duplicate that client's expiring form and only edit any data that needs changing for the new year.

**Note:** When you duplicate an existing form year after year, you run the risk of using outdated, non-current forms. A better approach is to add a new form of the type you are renewing, and then use the Prefill Form From Another button (at the top of the new form) to fill the new, current form with the data in the old, expiring form.

### Mark Forms for Mass Print

You can send several forms from several different clients to the printer all at once with the Mark Forms For Mass Print option.

1. Choose a client, then click the Acords tab and click the Mark Forms For Mass Print option. Click the Do It button, click to mark the forms you want to print, and click OK.
2. Then choose another client, click the Acords tab, click the Mark Forms For Mass Print option, click the Do It button, click to mark the forms you want to print, and click OK.
3. When you've selected all the clients' forms you want to mass print, you're ready to use the Print Mass Marked Forms option.

### Print Mass Marked Forms

1. Select any client and click the Acords tab. Click the Print Mass Marked Forms option, and click Do It.
2. A Print Preview of all the marked forms opens. Click the Print button in the toolbar and send the forms to your printer.
3. After the forms are sent to the printer, you'll be asked if you want to unmark the forms for mass printing – click Yes.

### Move Forms to Diskette or CD

If you want to move specific client data and forms to an EZAgent database on another computer (perhaps a computer at home, or a different standalone database in your office) you can use the Move Forms To Diskette and Read Forms From Diskette options to do this.

The procedure is to move clients and their forms, one client at a time, onto a CD or Flash Drive, then take the CD or Flash Drive to the other computer and move the clients and their forms into the other database one at a time.

To use the Move Forms To Diskette option:

1. Put a blank CD or Flash Drive in the drive.

2. On the Clients window, select a client whose data and forms you want to move.
3. Click the Acords tab. In the Acord Form Options section, click the Move Forms To Diskette option and click the Do It button. A window listing the client's forms will appear.
4. Select each form you want to move by clicking the form name (if you want to de-select a form, click that form name again). When you've selected all the forms you want to move, click the OK button.
5. In the Save As dialog box, click Save. A file that contains the client's data and forms will be saved with the client's name.
6. Repeat steps 2 through 5 for each client whose forms you want to move.
7. If you are using a CD, you will have to 'burn files to CD'.

## Read Forms from Diskette or CD

After you take the disc to the other computer and are ready to move the clients and their forms into the other database, follow these steps to use the Read Forms From Diskette option:

1. Put the disk or CD into your disk drive.
2. Open EZAgent and click on the Acords tab.
3. In the Acord Form Options section, click the Read Forms from Diskette option. An Open Account dialog box displays the files you moved to the floppy disc.
4. In the Open Account dialog box, click a client filename, then click Open. The client data and forms are imported, and a message tells you "ACORD forms successfully imported from diskette!".
5. Repeat steps 3 through 4 for each client file on the CD or Flash Drive

**Note:** You don't need a CD or Flash Drive if you're moving files to a different database across a network. When the "Please insert a disk into drive A:" message appears, click the Cancel button, then use the dialog box to navigate to a folder where you can save or open the files.

## The Formview Window

The screenshot shows the FormView application window with a menu bar (File, Edit, View, Tools, Options, Adjust, Help) and a toolbar. The main form is an ACORD Certificate of Liability Insurance, dated 4/14/2010. It includes a disclaimer, important information, and contact details for the producer (TiffanyCo Insurance) and the insured (2 GUYS BARBER SHOP). The form also lists coverages and a table for policy details.

INSURER	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFF. DATE (MM/YY)	POLICY EXPIRATION DATE (MM/YY)	LIMITS
INSURER A:	FARMER INSURANCE				EACH OCCURRENCE
INSURER B:					DAMAGE TO RENTED PREMISES (Per occurrence)
INSURER C:					AMED EXP. (Any one person)
INSURER D:					PERSONAL & ADJUTANT
INSURER E:					
INSURER F:					
INSURER G:					

## The Formview Toolbar

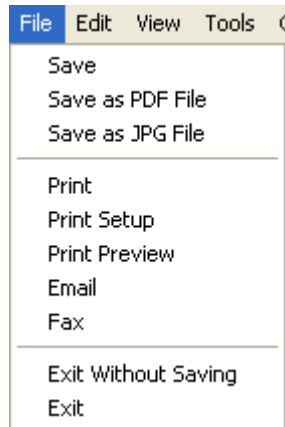
The Formview toolbar appears at the top of the open form.

When you place your mouse over a Formview toolbar button, the name of the button appears. The buttons, left to right, are as follows:

- **Save Form** saves your current work while you work in the open form. When you finish working in a form and close it, all your work is automatically saved.
- **Print** prints the open form.
- **Increase Form View** makes the form bigger on the screen.
- **Decrease Form View** makes the form smaller on the screen.
- **Go To Next Page** goes forward one page in a multi-page form.
- **Go To Previous Page** goes back one page in a multi-page form.
- **Left Justify** left-aligns text in the selected field.
- **Center Justify** center-aligns text in the selected field.
- **Right Justify** right-aligns text in the selected field.
- **Font Selection** lets you select a different font for the selected field.
- **Toggle Expanded Fields** allows you to type more in a field than would normally fit. If you have a lot of data, this process can take several minutes.
- **Cert Holder's Menu** lets you add, edit, delete, and print certificate holders.
- **Vehicle Menu** lets you add, edit, delete, and prefill vehicle information for vehicle forms.
- **Drivers Menu** lets you add, edit, delete, and prefill Drivers information on forms that require them.
- **Equipment Menu** for scheduling equipment and prefilling Acord forms.
- **Pre-Fill Form From Another** will fill a new form with data in an existing form.
- **Electronic Signature** lets you put your electronic signature on a form before you print, e-mail, or fax the form.
- **Spell Checker** will correct spelling errors.
- **Help** has general instructions for filling out forms.

## The ACORD Formview Dropdown Menus

## File . . .



**Save Form** saves the changes in the open form without closing it.

**Save As PDF File** saves the form as a PDF image file.

**Save As JPG File** saves the form as a JPG image file.

**Print** opens the Print dialog box so you can print the ACORD form.

**Print Setup** opens the Print dialog box so change print settings.

**Print Preview** shows how the document will look when printed.

**E-mail** allows you to send a form in an e-mail message directly from EZAgent.

**Fax** allows you to send the form to your fax software.

**Exit** closes the form and saves all changes you've made.

**Exit Without Saving** closes the form without saving your changes.

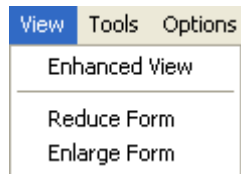
## Edit . . .



**Cut / Copy / Paste** are standard windows commands to cut, copy, and paste text.

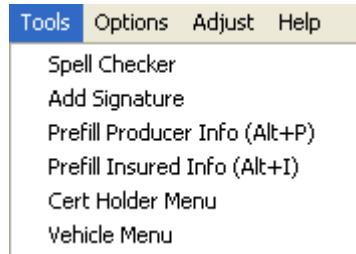
**Left / Right / Center** are used to justify text within the selected field.

## View. . .



**Reduce Form** and **Enlarge Form** allow you to adjust the magnification of the form on your screen.

## Tools. . .



**Spell Checker** opens the Spell Check dialog to check your text for errors.

**Add Signature** will place an electronic graphic representation of your signature (in your own handwriting), if you have taken steps to create your electronic signature.

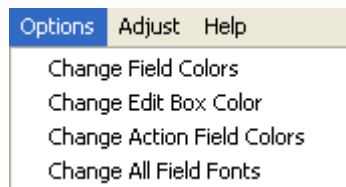
**PreFill Producer Info** automatically pre-fills your current agency information onto the form. This is handy if you have changed your agency information and are opening old forms that have your old info on them.

**PreFill Insured Info** automatically pre-fills the insured's current information if you're opening an old form and their information has changed.

**Cert Holder Menu** opens the certificate holder options dialog (see the Certificate Holder section below).

**Vehicle Menu** opens that client's vehicle list (see the Vehicle Database section below).

## Options . . .



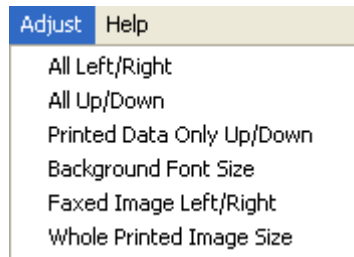
**Change Field Colors** changes the color of all data entry fields.

**Change Edit Box Color** changes the color of the active field (the field in which you're typing).

**Change Action Field Colors** changes the color of action fields. When you right-click in an action field, something pertinent to that field happens (such as an appropriate dialog box opening up).

**Change All Field Fonts** allows you to change the font of the data you type on the form. The changed font only lasts until you close the form.

## Adjust . . .



**All Left/Right** moves the printed form image to the left or right on the page.

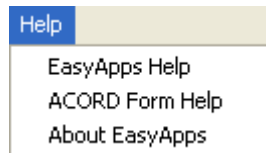
**All Up/Down** moves the printed form image up or down on the page.

**Printed Data Only Up/Down** moves the data you entered up or down in the printed form.

**Faxed Image Left/Right** moves the faxed form image to the left or right on the page.

**Whole Printed Image Size** prints the entire form larger or smaller to better fit the page.

## Help . . .



**EasyApps Help** provides general help for creating forms.

**ACORD Form Help** provides systematic instructions for filling out specific forms. Not all forms have a help file.

**About EasyApps** displays the software version number and the Agency Software, Inc. address and telephone information.

## *Entering Client Information in ACORD Forms*

Data entry in an ACORD form is much like data entry in the Clients window. You can move from field to field using your arrow keys, tab key, or mouse, and edit data using the Insert, Backspace, and Delete keys. You can use your mouse to move the scroll bar at the right to move up and down the form.

The first thing you will notice when you open an ACORD form is that some of your work has already been done for you. Fields for your agency name and address have been filled in with the data you entered during installation, and the client name and address information has been filled in with the information from the Clients window.

## *Certificate Holders*

The ACORD certificate forms allow you to have multiple certificate holders for a single client (so you can send a single certificate to your printer and print separate certificates for each certificate holder all in one operation).

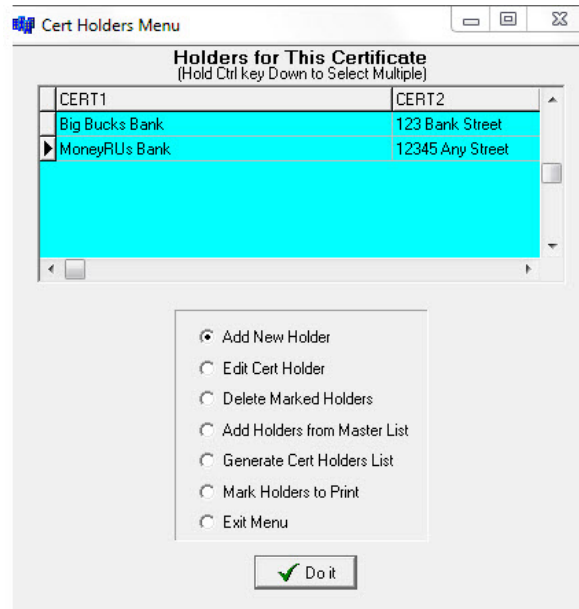
If the Certificate Holders Menu button (showing a person walking out of an envelope) is displayed in color, it means that the form can support multiple certificate holders. If the button appears grayed out, it means that the form doesn't support multiple certificate holders.

## Certificate Holders Menu

Here are some things you need to know about working with certificate holders and entering cert holder information in certificates.

You can type certificate holder and description of operations information in the boxes in the lower-left corner of the certificate, but if you type the information directly in the form on-screen, you won't be able to use the Cert Holders Menu to set up and print the certificate for multiple cert holders. You'll only be able to print that certificate for a single cert holder.

If you have more than one cert holder for a certificate, use the Cert Holders Menu instead.



### Adding Certificate Holders

1. To add a certificate holder, click the Cert Holders Menu button (it shows a person walking out of an envelope).
2. In the Certificate Holder Menu (shown above), select the Add New Holder option and click the Do It button
3. The Certificate Holder Detail dialog box (shown below) appears. Type the certificate holder's name and address information in the dialog box.  
**Note:** You cannot have two cert holders in the same certificate with identical names and addresses. If you need to issue multiple certificates to the same cert holder for different jobs, see the sidebar "Same Cert Holder, Multiple Jobs" (below) to learn how.
4. Enter the "Description of Operations" information in the Override Description of Operations box, and click the Done button. The cert holder name, address, and operations information will not appear on the form on-screen, but it will be printed when that certificate holder is marked for printing.
5. When you click Done, a new certificate holder is added to the certificate.

**Note:** There cannot be any blank certificate holders in the Cert Holders Menu list. If you see a blank certificate holder name at the top of the list, you'll get a Key Violation error the next time you try to add a new cert holder. You MUST delete the blank cert holder (click in the blank cert holder name, then click the Delete Marked Holders option and click Do It).

**Note:** If you need to enter a nearly identical name and address block or Description of Operations for a different cert holder, you don't need to retype it. Instead, select the text you need to duplicate, then right-click the selected text and click Copy on the shortcut menu. Then close the Certificate Holder Detail window, add a new cert holder (or edit a cert holder), right-click in the box where the copied text should go, and click Paste on the shortcut menu.

## Same Cert Holder, Multiple Jobs

Suppose you have a client, perhaps a construction company, who needs to issue several certificates (for different jobs) to the same cert holder. But you can't enter cert holders with identical names and addresses in the same cert... so what do you do?

Try this: Add a new cert holder, but enter a job number or description in the Address line in the Certificate Holder Detail window, then enter the street address in the City, St, Zip line, the City in the Phone line, and so on, moving each address entry down one line (as shown below).

**Certificate Holder Detail**

Name: Big Bucks Bank  
 Address: BigNews Shopping Center Construction  
 City, St, Zip: 123 Bank Street  
 Phone: Anytown, ST 90090  
 Other: 555-123-4567  
 Other:

This keeps the Name and Address field combination (really the Cert1 and Cert2 fields) from being duplicated, and you can print all the certificates you need for the same cert holder's different jobs. The resulting printed certificate entry looks like this:

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space needed)	
Description of operations, etc., etc.	
CERTIFICATE HOLDER	CANCEL
Big Bucks Bank BigNews Shopping Center Construction 123 Bank Street Anytown, ST 90090 555-123-4567	SHC THE ACC  AUTHOI

ACORD25 (2009/09)

The ACORD name and logo are registered trademarks of the American Insurance Association.

## Editing Certificate Holders

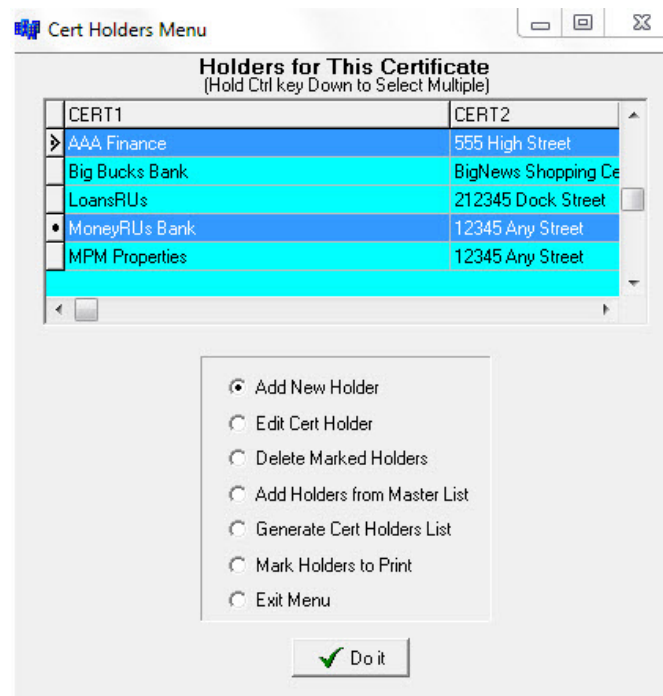
To edit or modify existing certificate holders, do the following:

1. Click the Cert Holders Menu button (the button that shows a person walking out of an envelope).
2. Click the name of the cert holder you want to edit.
3. Select the Edit Cert Holder option on the Cert Holders Menu, and click Do It.
4. Make your edits, then click the Done button.

## Adding Certificate Holders from the Master List

The EZAgent database has a Master List that holds all the certificate holders for all the certificates in the database. If a certificate holder has already been added for one certificate or client, you can add that same cert holder to another certificate (for the same client or for another client) by choosing it from the Master List.

To add an existing cert holder from the Master List to the open certificate, select the Add Holders From Master List option on the Certificate Holder menu, and then click Do It. The Master Cert Holder List appears, showing all of the certificate holders for all of your clients.



In this dialog box, click cert holder names with your mouse to mark them, click the Add Marked Holders to Current Form option, and then click Do It. The marked cert holders will be added to the cert holder list for the open certificate.

**Note:** If you delete cert holders from the Master List, they'll be deleted from *all* certificates. To delete a cert holder from just one certificate, open that certificate and delete the cert holder using the Certificate Holders Menu.

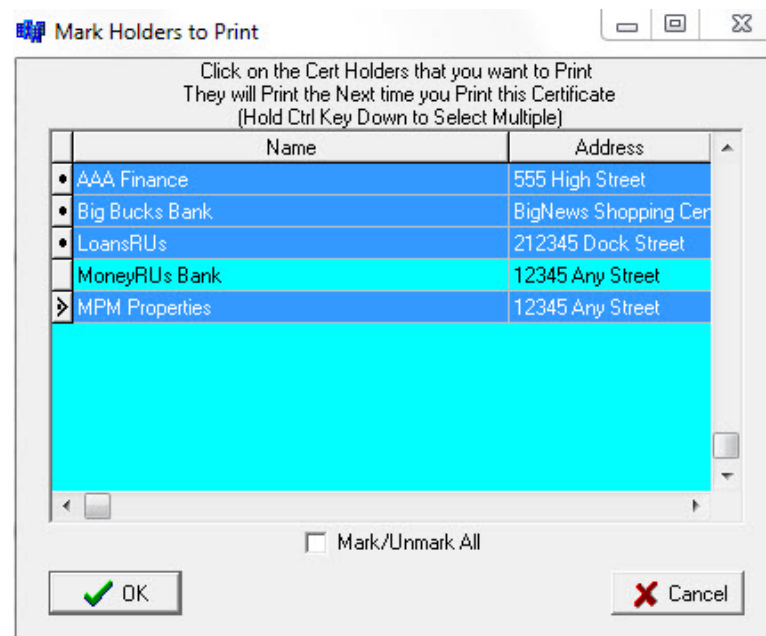
## Deleting Certificate Holders

1. Open the Cert Holders Menu.
2. Select the Delete Marked Holders option.
3. Select the names of the cert holder(s) you wish to delete. (You can mark multiple holders by holding the Ctrl key down as you click the names.)
4. Click the Do It button. EZAgent will ask if you really want to delete the certificate holder – click Yes. The cert holder is deleted from the open certificate.

## Printing Certificates for Selected Cert Holders

You can print a certificate for a single cert holder or for multiple cert holders (but don't try to send more than 10 at a time to your printer). To print certificates for cert holders:

1. In the open certificate, click the Cert Holders Menu button. In the Cert Holders Menu, select the Mark Holders To Print option and then click the Do It button.
2. The Mark Holders to Print dialog box appears (shown below). Click each cert holder name you want to print to highlight it. Hold down the Ctrl key while you click to select more than one. If you want to mark all the certificate holders with one click, click the Mark/Unmark All check box (click the check box again to unmark all the cert holders).



3. Click OK. You will be asked if you want to start printing marked certificate holders now. Click Yes.
4. The Print dialog box for your printer appears – you can print multiple copies of each certificate by entering the number of copies in the Numbers of Copies box. Then click OK to print.
5. After you close the form, you will be asked if you want to unmark all the holders you have marked for printing. Click Yes.

### Generate Cert Holder List

To generate a printable list of certificate holders for the open certificate, select the Generate Cert Holder List option on the Certificate Holders Menu, and click Do It.

### Close the Certificate Holders Menu

To close the Certificate Holders Menu, select the Exit Menu option, and click Do It.

## Vehicle Database

The Vehicle Database stores vehicle information by client and allows entered information to be pre-filled on ACORD forms such as ID cards, Vehicle Schedules, and other auto applications. If the Vehicle Menu button (the red car button) is fully colored (not grayed out), it means the open form has access to the vehicle database.

### Enter Vehicles in the Vehicle Database

To open the vehicle database, click on the Vehicle Menu button (the red car button). The Vehicle Database dialog box opens.

Order	Year	Make	Model	Body Type	VIN	Date Added
1	03	Chevy	Silverado	Truck	JK2H35082N	4/14/2010
2	67	GMC	S-15	Truck	954HRL14Y	4/14/2010
3	99	Mercury	Mountaineer	SUV	7926B4871	4/14/2010

Options:

- ☒ Add New Vehicle
- ☐ Edit Selected Vehicle
- ☐ Delete Selected Vehicle
- ☐ Prefill Form with Marked Vehicles
- ☐ Prepare Vehicle Report

☐ Show Deleted

To add a vehicle, click the Add New Vehicle option and then click the Do It button. The Vehicle Detail dialog box appears.

Fill in all vehicle information, and then click OK. The Vehicle Database reappears.

### Fill a Form with Vehicle Information

To prefill the open form with information for a specific vehicle, click the vehicle to highlight it. To select more than one vehicle, hold down the Ctrl key while clicking on the vehicles.

Then click the Prefill Form with Marked Vehicles option and click Do It. The vehicle data is filled into the open form.

**Note:** You can only prefill the number of vehicles that the specific open form has spaces for, with the exception of Auto ID cards. In Auto ID cards, you can prefill up to 10 vehicles at a time, and EZAgent will create the number of ID cards required for those vehicles.

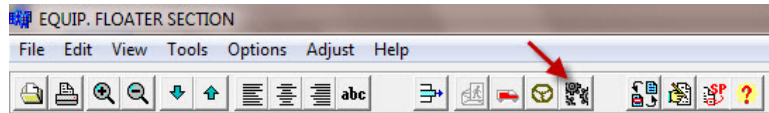
### Print a Vehicle List Report for a Client

A vehicle list report is a printable list of all vehicles associated with the current client. To create it, open the Vehicle Database, then click the Prepare Vehicle Report option and click the Do It button.

Vehicle List Report For: Jake McCormack			
Year	Make	Model	VIN
1999	Mercury	Mountaineer	d2jdf92kjhw09k
2003	Chevrolet	Silverado	1waef781409dk

## ***Equipment Database***

The Equipment Database stores equipment information and allows entered information to be pre-filled on ACORD forms. If the Equipment Menu button (gears button) is fully colored (not grayed out), it means the open form has access to the equipment database.



### **Add Equipment to the Equipment Database**

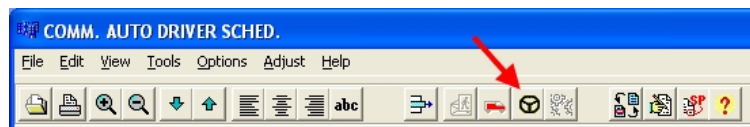
Click the 'Add New Equipment' option and the following screen appears

A screenshot of a form titled "Equipment Detail". The form contains several input fields organized into two rows. The first row has fields for "Type", "ID/Serial Number", "New/Used", "Capacity", and "Date Purchased". The second row has fields for "Manufacturer", "Model", "Model Year", "Other", and "Amt of Ins.". At the bottom left is a "Done" button with a green checkmark icon, and at the bottom right is a "Cancel" button with a red X icon.

Click 'Done' when finished. From the equipment menu you can Add/Edit/Delete/Prefill forms and print an Equipment Report.

## ***Drivers Database***

The Drivers Database stores driver information by client and allows entered information to be pre-filled on ACORD forms such as Business Auto Section, and other driver applications. If the Drivers Database button (the steering wheel button) is fully colored (not grayed out), it means the open form has access to the drivers database.



### **Add Drivers to the Drivers Database**

Click the 'Add New Driver' option and the following screen appears

**Driver Detail**

Name		Address		State Licensed	
Mitch McInelly		215 W Commerce Drive		ID	
Sex	Marital Status	Date of Birth	Years Exper.	Year Licensed	Date Hired
M	M	12/15/1968	20	1983	
Drivers License #		Social Security #		Broaden No Fault	DOC
CA23424535		517-22-5423		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Date Added		Date Deleted			
4/15/2010					
Done			Cancel		

Click 'Done' when finished. From the drivers menu you can Add/Edit/Delete/Prefill and print a Drivers Report similar to the vehicle area listed on the previous page.

## ***E-mailing Forms***

You can use the EZAgent E-mail feature to send Acord forms, saved as PDF or JPG files, directly from EZAgent through your e-mail provider.

**What you need:** Your e-mail service must be a POP3 account (web-based e-mail providers won't work) and you need your SMTP server name, user name, and password (if one is required for outgoing mail). You can get all this information from your Internet Service Provider (ISP).

### **To set up e-mail:**

1. Open any ACORD form, and click File – Email.
2. The Email Form dialog box opens (shown below) with the saved file name in the Attachments box.

EmailForm

Email Address:  Name:

From:  connie@agencysoftware.com

To:

CC:

Subject:  EasyApps ACORD Forms for 2 GUYS BARBER SHOP

Attachments:  C:\Users\CONNIE\Forms.pdf

☐ Check Here to Request a Receipt After Mail Delivered

3. Click the Email Setup button (the button with the gears).
4. In the Email Setup dialog box (shown below), fill in your email address and the information you got from your ISP, and click OK.

The Password box is for the password your ISP requires for sending outgoing mail. Not all ISPs require outgoing mail passwords – if yours does not require a password, leave this box blank.

5. Then click OK.

Email Setup

Email Address:  Name:

Default 'From':  connie@agencysoftware.com

SMTP Server:  <hostname.com> Port:  25

UserName:  <username>

Password:

☐ My Outbound Server Requires a Password

☐ Automatically CC Copy to Sender

Files Smaller  Image Quality:  Quality Higher

OK  Cancel

6. Enter the recipient address in the To: box.
7. In the large box, enter any message text you want to send the recipient.

8. Click the Send Email button.

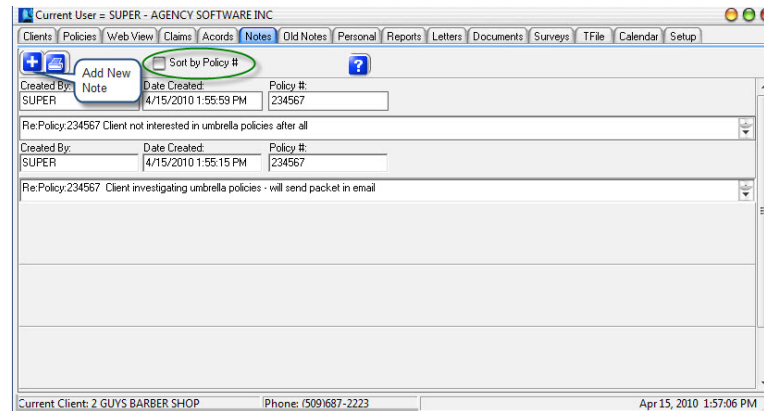
**To send e-mail after you set it up:** Follow the steps above, but skip steps 4 and 5. You only need to set up the first time you use it.

**Note:** You can attach more files to your message by clicking the ellipsis button (at the right end of the Attachments box), and selecting the files you want to attach.

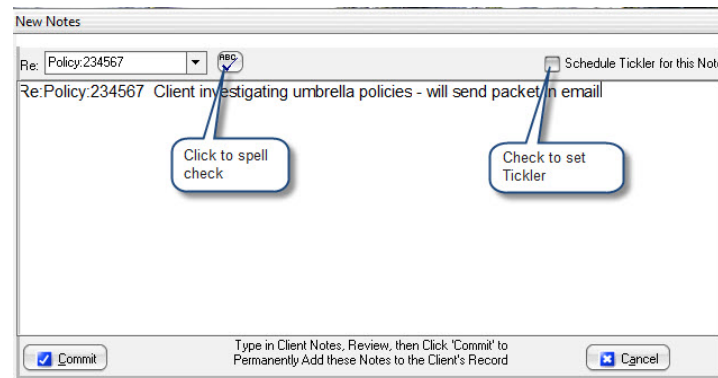
**If EZAgent Email doesn't work for you** You can save your forms as JPG or PDF files by clicking File – Save As PDF (or File – Save As JPG), and then attach the saved files to a message in your normal e-mail program.

## The Notes Window

Click the Notes tab to view the Notes window. If your Notes Tab does not look like the example below go to the Setup tab and click on New Notes.



1. To start a new note, click the Add New Note button. A New Notes window opens.



Notes are automatically time-and-date stamped, and your login user name is entered – see Setup window and Employees Database.

2. Type your note in this window, then click the Commit button.

**Note:** Clicking the Commit button posts the note and makes it read-only (meaning it cannot be edited or deleted, ever). Do not click the Commit button until the note is complete and correct.

## The Personal Window

The Personal window is where you can record personal data about your clients – such as the names and birthdays of their family members, and details about their vehicles. As always, start by selecting the client's name in the Clients window.

Then click on the Personal tab to open the Personal window. To add a record to the Family Members list, click the Insert Record button (the + button) in the toolbar below the family members area. Fill in the client's family members and personal data about them. Click the Post Edit button (the ✓ button) to save the record.

To enter vehicle information for the client, click the Vehicles button in the upper-left corner of the family members area. Click the Add New Vehicle button to add vehicle information for the selected client. The vehicles are entered in the EZAgent Vehicle Database. After you add vehicles you can edit them, delete them, or print a report listing all the vehicles and details for each one.

The screenshot shows the EZAgent Personal window. The top menu bar includes: Clients, Policies, Web View, Claims, Acords, Notes, Old Notes, Personal (highlighted), Reports, Letters, Documents, Surveys, TFile, Calendar, and Setup. The main area is divided into two sections. The top section, titled 'Family Members', contains a table with columns: Member Name, Nickname, Notes, Relation, DOB, Birthday, SSN, and Status. The table lists two members: Jake McCormack (Self, 10/8/1954, 10/10/8, ACTIV) and Tilly McCormack (Spouse, 10/8/1954, 10/8, ACTIV). The bottom section, titled 'Vehicles', contains a form for adding or editing vehicle information. The form includes fields for Name (Jake McCormack), NickName, Relation (Self), DOB (10/8/1954), Birthday (10/10/8), SSN, Drivers License, Status, and Notes. To the right of the main area is a 'Demographics' panel with fields for Age Group, Education, Employee/Occupation, Income Bracket, Marital Status, Number of Dependents, W-4 Withholdings, Gender, Smoker, and Hobbies. At the bottom of the window, a status bar shows: Current Client: 2 GUY'S BARBER SHOP, Phone: (509)687-2223, and Apr 15, 2010 2:26:40 PM.

Member Name	Nickname	Notes	Relation	DOB	Birthday	SSN	Status
Jake McCormack			Self	10/8/1954	10/10/8		ACTIV
Tilly McCormack			Spouse	10/8/1954	10/8		ACTIV

**Note:** You can prefill Acord vehicle forms such as ID cards with the vehicle information already entered in the EZAgent Vehicle Database.

The Customer Demographics entries on the right apply to the client, not to the specific family members.

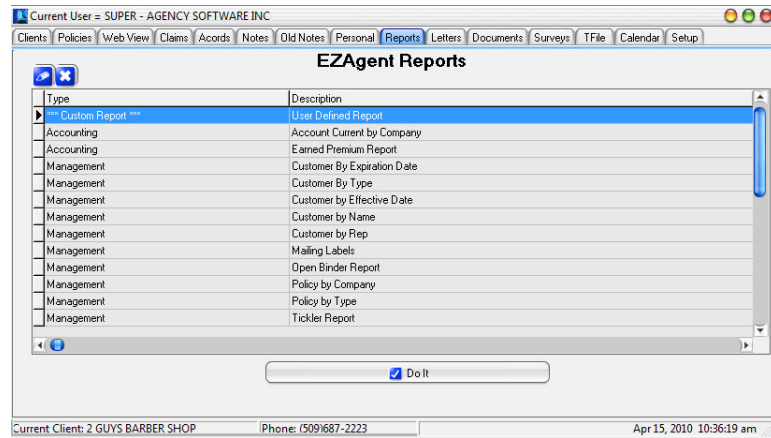
When you first install EZAgent, you won't see any field headings in the Customer Demographics list. You create headings for the demographics categories (up to 10) in the Setup window. Once you've created the demographics categories, the headings will appear on this window and can be used for reporting and marketing.

The toolbar at the bottom of the window is for adding, editing, and deleting records in the Family Members list. The buttons have the same functions as similar buttons in other windows in EZAgent.

## The Reports Window

Click the Reports tab to open the Reports window (shown below). In the Reports window, you'll find all the built-in reports that come with EZAgent. These reports are ready to be used. They can be edited, which requires some understanding of SQL language, and you can also create your own custom reports (which does not require any SQL knowledge).

A very useful new report in the list is the Cross-Marketing report, which allows you to look up customers with a specific company who have one type of policy but not another (for example, a Homeowner's policy but not an Auto policy).



### Open a Built-in Report

1. Click the report name, then click the Do It button. (You can also double-click the report name to open it.)
2. If the report requires further input from you (selection criteria such as a date or date range, or a Rep name), a box will open where you can select or enter the requested information. If a data entry box opens, you *must* make selections in all the fields before the report will open. Then click OK.
3. The Report Setup box opens next, with the Preview option selected. Click OK to open a preview of the report before you print it.
4. If there are several fields of data in the report, you'll see a Report Status dialog box with the directive Enter the number of lines to break each record into:. Enter **2** or **3** in the spin box to break each record into multiple lines of readable text. **Note:** If you have many fields in each record and you break each record into a single line, the text may be too small to read.

### The Report Preview Window Toolbar

In the Report Preview window toolbar (across the top of the window) you have various Zoom buttons to change your view of the report, and buttons to move from page to page in a multi-page report, print the report, and exit the report viewer window.

You can also save the current report as a .ndr snapshot file in the EZAgent Themes folder, and open other reports that you've previously saved as .ndr snapshot files in the EZAgent Themes folder.

### Create a Custom Report

You can create your own custom reports to show whatever specific data you choose.

To create a custom report:

1. Select the \*\*\*Custom Report\*\*\* report name at the top of the reports list, and click Do It.
2. In the Query Wizard window that opens, you'll build your custom report.  
The next steps will guide you through creating a custom report that's a list of client names and phone numbers for clients in your zip code area.
3. In the Get Records From My box (at the top of the window), select **Client**.
4. Next you'll enter the *criteria* that determine which clients will be listed in the report – specifically, the clients with your local zip code.  
In the first line of three boxes, in the (fields) box, select **ZIP**. In the (conditions) box, select **=**. In the (values) box, type your local zip code. In this example I'll enter **99021**, because I have lots of clients with that zip code.
5. In the Available Fields list, double-click each field you want to display in your report. In this example, I'll select **Client.'Name'**, **Client.'Address1'**, **Client.'City'**, **Client.'State'**, **Client.'Zip'**, **Client.'Phone'**, and **Client.'Phone2'**.  
As you double-click each field name, it appears in the Selected Fields list. To delete a field from the Selected Fields list, click the field name and then click the Remove Selected Field button (between the red arrows that point up and down).
6. If you want the records in your report to be listed in a specific order, open the Order By list and choose the field name by which you want to sort the list. The figure below shows this example report set up and ready to run.

Query Wizard

Get Records from My: Client (tables)

Table that Have: Client

(fields) ZIP (conditions) = (values) 99021

(and/or) (fields) (conditions) (values)

(and/or) (fields) (conditions) (values)

Available Fields: Client.'ADDRESS2', Client.'CITY', Client.'STATE', Client.'ZIP', Client.'PHONE', Client.'PHONE2'

Selected Fields: Client.'NAME', Client.'ADDRESS1', Client.'CITY', Client.'STATE', Client.'ZIP', Client.'PHONE'

Export To: ☒ Report, ☐ Mailing Labels, ☐ Mail Merge File

Order By: Client.'NAME'

Resulting SQL Code: Select Client.'NAME', Client.'ADDRESS1', Client.'CITY', Client.'STATE', Client.'ZIP', Client.'PHONE', Client.'PHONE2' From Client Where (Client.'ZIP' = '99021') ORDER BY Client.'NAME'

OK Save Cancel

7. Click the OK button.
8. The Report Setup box opens next, with the Preview option selected. Click OK to open a preview of the report before you print it.

After you close or print the report, you will be returned to the Query Wizard. If you want to save this report to use again, click the Save button. Give the report a name you'll recognize later, select Marketing in the Report Category box, and click OK. Then click Cancel in the Query Wizard. The report is added to the list to run at a future date.

**Note:** The report you create is nothing more than a set of instructions, called a *SQL statement*, that tells EZAgent to go and get the data you specified every time you run the report. This means that every time you run the report, you get the data that is currently in the database when you run it.

## Create Mailing Labels

Creating mailing labels is similar to creating custom reports – but *much simpler*.

To create mailing labels,

1. Select **\*\*\*Custom Report\*\*\*** on the Reports list.
2. In the Query Wizard, in the Export To options on the right side, select the Mailing Labels option, and click OK.
3. In the Clients to Mail Merge window, select the clients to create labels for. You can hold down the Ctrl key to select several names, or mark the Click Here to Select All check box to select all the names in the list. Then click OK.
4. In the Label Setup window, choose where the client name will be pulled from the Client tab, Client Name or First Name Last Name line in each label to be created. Then click OK.
5. Click OK in the Report Setup window that appears.
6. Look over your labels, and if they're what you want, send them to your printer. They'll print to Avery 5160 or 5960, or similar 3-column-by-10-row label sheets.

**Note:** If you filter your client list on the Clients window before you create mailing labels, the labels will be created only for the names in the filtered client list. For example, if you want to print labels only for a specific zip code: open the Clients window, filter the Clients list for that zip code, and then open the Reports window and create the mailing labels.

## Edit a Report

Any report, including the default reports that came with EZAgent, can be edited if you understand SQL. Select the report you want to edit, then click the Edit Report button (the pencil icon) above the reports list. If you don't understand SQL, it's easier to create a new report and delete the old one.

## Permanently Delete a Report

To permanently delete a report, either default or custom, select the report name in the Reports window, and click the Delete button (the **X** button) above the reports list.

**Note:** Once you delete a report, it's gone forever. Agency Software technical support can replace default reports for you, but this will also delete any custom reports you've created. So be very sure you want to delete a report permanently before you do it.

## *The Letters Window*

Click on the Letters tab to open the Letters window. This window has all the features of most modern word processors.

## What's In the Letters Window

There are more than 56 insurance-specific letters included in EZAgent. These letters are ready for merging with your client data. You can also edit these letters to customize them and then save the built-in letter with your customized changes, or save the changed letter with a new file name so you don't lose the original built-in letter.

**To open built-in letters that come with EZAgent (or custom letters you have created and saved in EZAgent):** On the Letters window, click File, then click Open. A window opens to the Docs folder in EZAgent. Click the name of the letter you want to open, then click the Open button.

**To create new custom letters:** Click File, then click New. Follow the procedures in the Creating Custom Mail Merge Letters section below.

**To save changes to an open letter:** Click File, then click Save.

**To save a letter with a new file name (as a new letter):** Click File, then click Save As, and give the letter file a new name.

**To close the open letter:** Click File, then click Close.

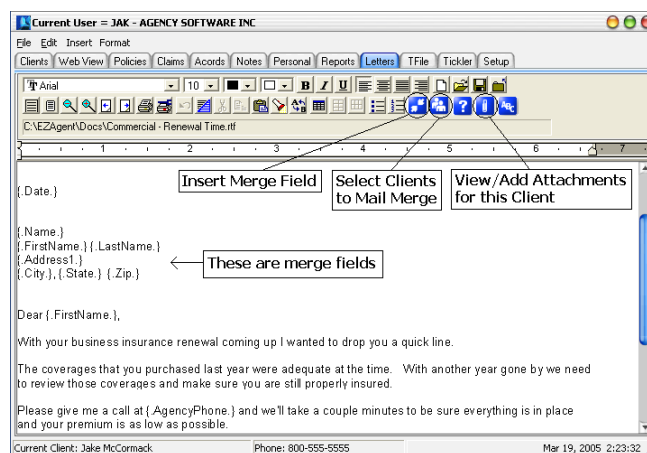
## Merge Client Data Into a Letter

EZAgent allows you to merge your agency and client information into more than 56 preinstalled letters, or create your own letter in

either EZAgent or a word processor and then merge your data into it<sup>1</sup>.

1. To merge data into a pre-built EZAgent letter, start by opening that document. (The merge fields are already in place in these documents.)
2. Select the client(s) you wish to merge into the letter by clicking the Select Clients to Mail Merge button. In the list of clients that appears, click to select the clients you want to include. (Select multiple clients by holding down the Ctrl key while clicking on the clients).
3. Click the OK button. Multiple identical documents are created, each filled with the merged client data.
4. Print the merged documents by clicking the Print button (or click File, then Print).
5. After you print the documents, click File, then click Close to close the merged document without saving it.

**Note:** Do not save the letter after you merge client data into it. Doing so will overwrite the original letter containing merge fields, and you won't be able to use that letter as a merge-able file again.



## Creating Custom Merge Documents

<sup>1</sup> Files compatible with this feature of EZAgent must be saved as \*.rtf file types. Files saved as \*.doc files will not be recognized. Files saved with table formatting in a word processing program will be altered when saved as \*.rtf files.

EZAgent allows you to merge your agency and client information into custom documents that you create.

1. Click File, then click New. The window won't change, but the program knows you have started to create a new file.
2. Type your new letter/document. Wherever you want to enter merge data (such as client name, agency name, date, phone, policy#, etc.), click to place the cursor at that point and then click the Insert Merge Field button. (You can also click Insert, then click Merge Field.)
3. Scroll down and select the merge field you want to insert, and click OK. When you run the merge in the finished letter, the program will replace each merge field with the corresponding client information in the database.

A merge field consists of a field name from the database, surrounded by periods and curly brackets. You cannot create your own merge fields – the names must be identical to field names in the EZAgent database.

4. When you finish your document and all merge fields have been entered, save the new document by clicking on the Save button (or click File, then Save).

In the Save As dialog box, enter a name in the File Name box. The document is saved in the Docs folder in EZAgent.

To merge data into this document for printing, follow steps 2 through 5 in the Merge Client Data into a Letter section above.

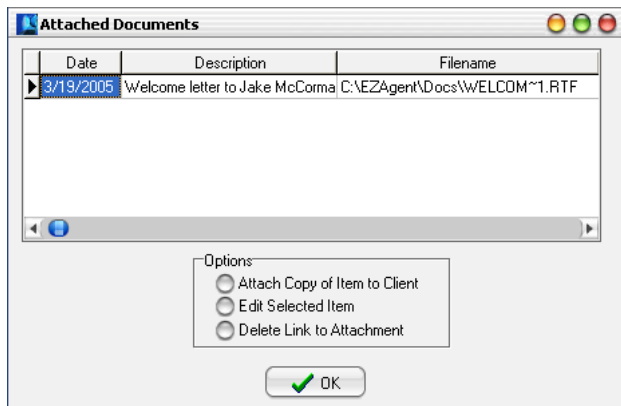
**Note:** *Do not* save the letter after you merge client data into it. Doing so will overwrite the letter containing merged fields.

## Attaching Letters to Clients

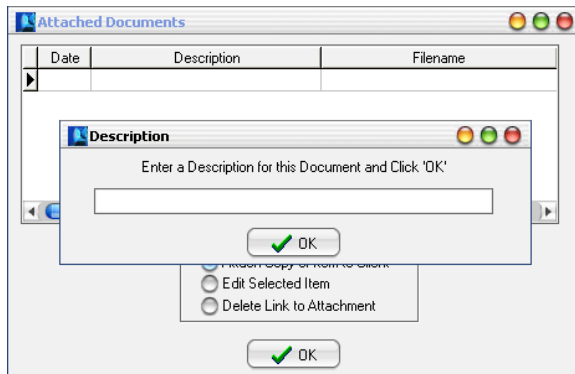
When you attach a letter to a client, the document is linked to that client so you can find it again very quickly when that client is selected in the Clients window.

To link a letter to a client,

1. In the Clients window, select the client to whom you want to attach the document.
2. In the Letters window, open or create a letter and merge the data into it (using the procedures in the previous sections).
3. Click File, then click Save As to save the merged letter as a new file with all the merged data in it. In the Save As dialog box, give the file a *new* name. It's saved in the Docs folder in EZAgent.
4. Click the View/Add Attachments For This Client button (it looks like a paper clip). The Attached Documents window appears.



5. To attach the current letter to this client, select the Attach Copy Of Item To Client option, and click the OK button.
6. A window opens asking you to enter a description for this document (the description appears in the Description column in the Attached Documents window). In the box, type a description that identifies the document and click OK.



The date, description, and filename for this document will appear in the Attached Documents window after you click OK and then click the Add/View Attachments For This Client button again.

**To open and then edit or print letters you have already attached to this client**, click the Add/View Attachments button. Click the letter you want to open, then click the Edit Selected Item option and click OK.

**To delete the attached letter from the client**, click the Delete Link To Attachment option. The document will no longer appear in the Attached Documents window, but the document file will still be saved in the Docs folder in EZAgent.

**To close the Attached Documents window** without attaching, opening, or deleting any documents, click the X button in the upper-right corner of the window.

### ***The EZAgent Document Manager***

With the Document Manager, you can attach any kind of electronic document to any specific client in your AgencyPro database. Do you have a letter, a picture, or a spreadsheet that you want to attach to a specific client so that you can quickly locate and open that particular file? Now you can do exactly that with the new EZAgent Document Manager.

#### **What the Document Manager Can Do for You**

The Document Manager is designed to attach or link specific files in your computer to specific clients in your EZAgent database.

You can attach all kinds of documents to specific clients: any scanned image, forms saved as PDF or JPG files, text documents (such as a Word file), spreadsheets (such as an Excel workbook), and pictures of any kind.

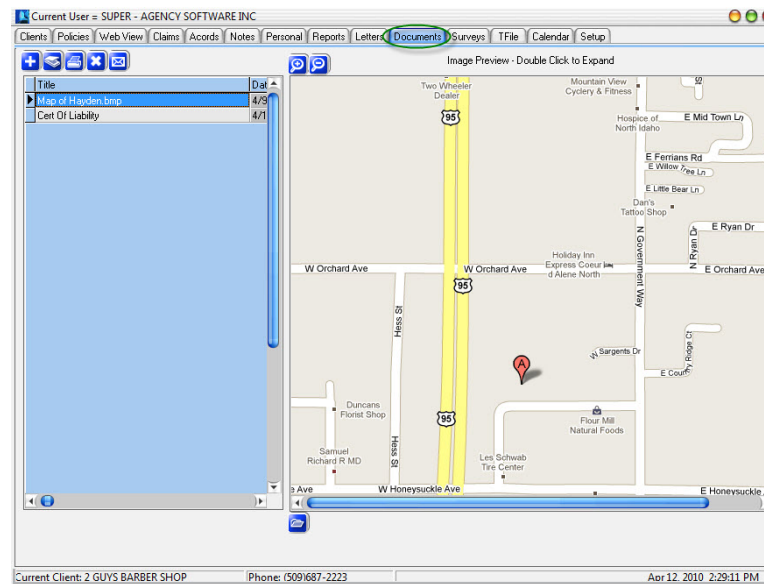
When you select a specific client on the Clients tab, all the attached or linked files for that client are listed on the Images page.

#### **What's the Difference Between Linking and Attaching?**

*Attaching* creates a separate copy of the file for the database. Any changes you make to the attached copy in the database are made only in the attached copy – they don't change the original file.

*Linking* creates a link to the original file. If you open a linked file and make changes, your changes appear in the original file.

Whether the file is linked or attached, if it's a graphics file (*specifically* a BMP or JPG file) you can see the file image in the Image Preview pane on the right side of the Images window.



The files are easy to open. You can either double-click the name of the file in the Title pane (on the left side of the window), or double-click the image in the Image Preview pane (on the right side of the window). Double-clicking in either pane opens the file in its *native* program.

### What's a Native Program, and Can I Change It?

A file's *native program* is the program in which the file normally opens in your computer. For example, if your computer normally opens a BMP (bitmap) picture in the Microsoft Photo Editor, then that is the BMP file's native program – and when you double-click to open that particular file in the EZAgent Images window, that file opens in the Microsoft Photo Editor. Likewise, any PDF file opens in its native program, which is always the Adobe Acrobat Reader. (The native program is often referred to as the *file type* or the *file association*.)

**To change the file association** – the native program in which a file opens – open any folder window, such as the My Documents folder.

1. In Windows XP or Windows 2000, click the Tools menu.  
In Windows 98, click the View menu.
2. Click the Folder Options command. In the Folder Options dialog box, click the File Types tab. A long list of file *extensions* (the 2-, 3-, or 4-letter extensions that appear after the period at the end of filenames) appears in the Registered File Types pane.
3. Scroll down the list and select the file extension for which you want to change the association (e.g., BMP or JPG). When you click the extension to select it, the Details pane tells you what program that file type currently opens in.
4. Click the Change button and select a different program in which to open the file, then click OK. *All* files that have that particular extension will open in the program you selected.

### Adding Files with the Document Manager

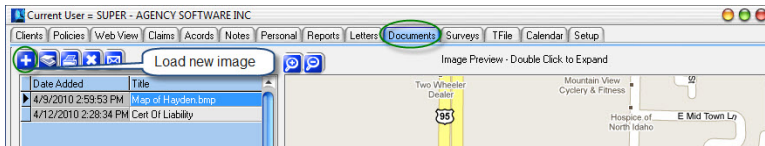
There are three ways to add files to the Images window in EZAgent. You can:

- Add files with the buttons on the Images page in EZAgent
- Use the Document Manager icon on your desktop (even when EZAgent is closed)
- Add scanned files directly from your ScanSoft PaperPort 9.0 scanning software

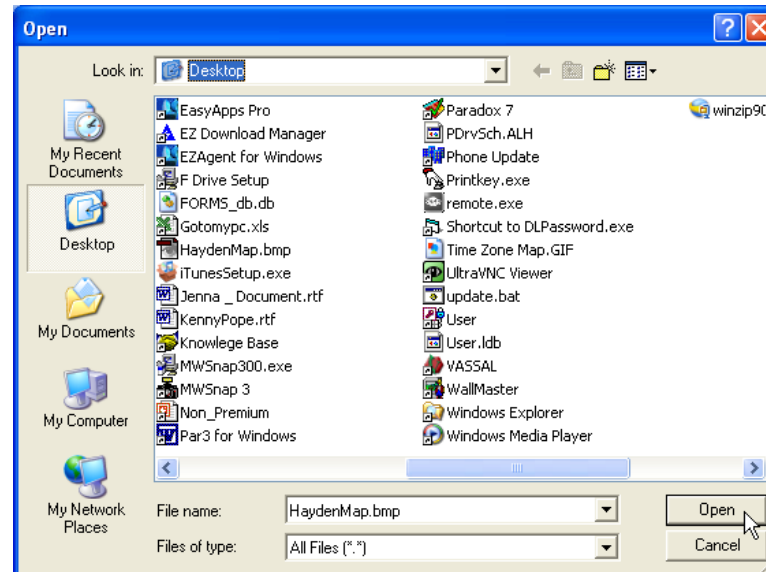
## Adding Files from the Images Window

To add a new file when you have EZAgent open:

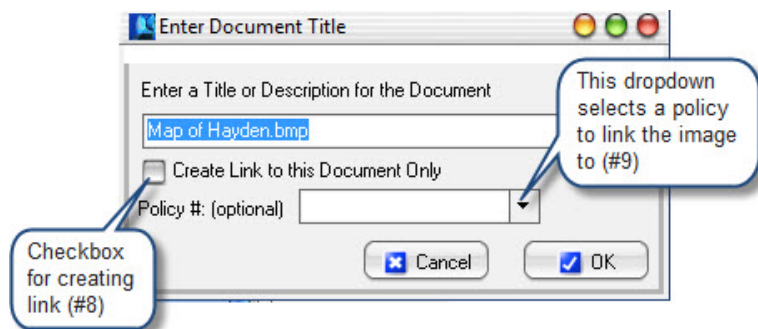
1. On the Clients window, select the client to whom you want to attach the file.
2. Click the Images window to open the Images page.
3. Click the Load New Image button.



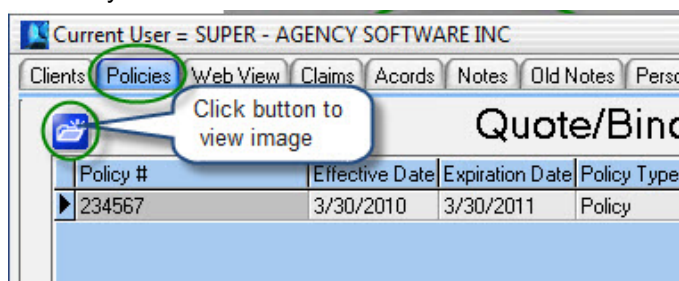
4. In the Open dialog box that appears, navigate to the folder where the file is saved.
5. Click the file name, and click the Open button.



6. In the Enter Document Title box that appears, enter a document title – this is the title that will appear in the Title pane in the Images window (so make it something you'll recognize).



7. If you want to link to the file rather than create a copy, click the Create Link To This Document Only check box to mark it.
8. If you want to attach a copy of the file, leave the check box clear.
9. If you wish to link the image to an existing policy, drop down the list and select the policy number. This will allow the image to be viewed from the Policy tab.



10. Click OK.

The file is linked or attached, the title you typed appears in the Title pane, and the image (if it's a BMP or JPG file) appears in the Image Preview pane.

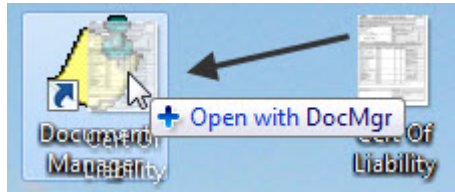
### Adding Files with the Desktop Document Manager Icon

EZAgent puts the Document Manager Icon on your desktop during the install. If you need to put the icon on after the install, open the network drive where EZAgent is installed, open the EZAgent folder, and right click on DocMgr and choose send to desktop.



After you install the Document Manager, you'll find a new icon on your desktop. You can attach or link a file to a client by dragging the file's icon onto the Document Manager icon.

**Note:** You cannot run the Document Manager by double-clicking the icon – you can only drag-and-drop file icons onto it.

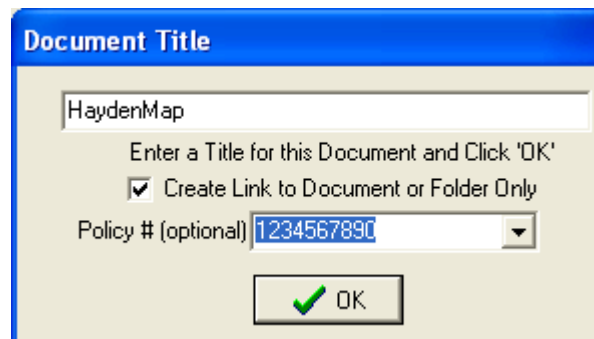


1. You can drag the file's icon from the desktop, or from a folder window. When you drop the dragged icon, the Document Importer window opens.

**Note:** If you want to use the Document Manager icon to attach or link an e-mail message, you must first drag-and-drop the e-mail message from your e-mail program onto the desktop first, then drag-and-drop the e-mail icon from the desktop onto the Document Manager icon. You cannot drag the email directly from the email program to the document manager.



2. In this window, navigate to the client to whom you want to attach the file. All the techniques you can use for finding the right client in EZAgent's Clients window will work here, too – for example, type the first few letters of the client name, or scroll to a different column and click the column header to sort by that column.
3. Select the client name, and click the Do It button. You can use any techniques you normally use in the Clients page to navigate to your client (e.g., type the first few letters of the client name to jump to that part of the list).
4. In the Enter Document Title box that appears, enter a document title – this is the title that will appear in the Title pane in the Images window.



5. If you want to link to the original file rather than create a copy, click the Create Link To This Document Only check box to mark it.  
If you want to attach a copy of the file, leave the check box clear.

**Note:** If you drag a desktop shortcut to your Document Manager icon, it doesn't matter whether you attach or link – you are attaching or linking a *shortcut* rather than the actual file, and opening the file from within EZAgent will always run that shortcut and open the original file.

The arrow  
tab  
indicates  
it's a  
shortcut



If you wish to link the image to an existing policy, drop down the list and select the policy number. This will allow the image to be viewed from the Policy tab.

6. Click OK.

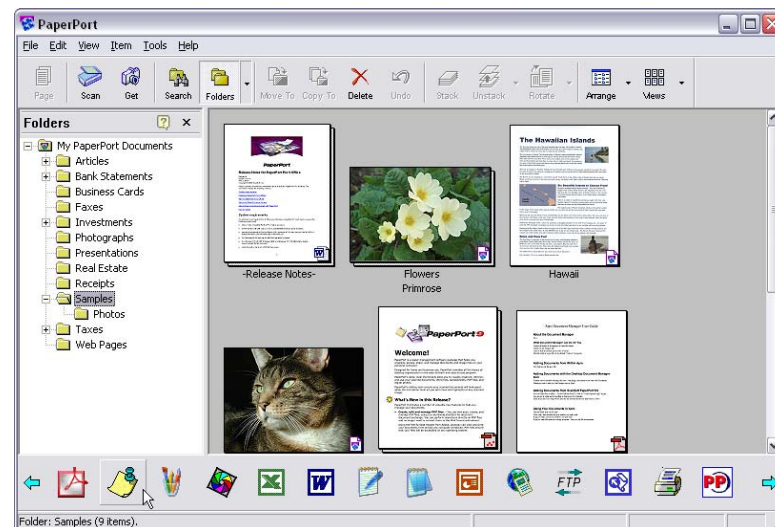
The file is linked or attached, the title you typed appears in the Title pane, and the image (if it's a BMP or JPG file) appears in the Image Preview pane as displayed above.

**Note:** If EZAgent is open when you attach a file using the desktop Document Manager icon, the newly-added file will not be immediately visible in the Images window. Click the Clients tab, then click the Images tab again, and you'll see the newly attached file in the list.

### Adding Files from ScanSoft™ PaperPort 9

If you have a ScanSoft™ PaperPort 9 scanner, you can attach or link scanned files to your EZAgent clients directly from the PaperPort window.

After you install the EZAgent Document Manager, you'll see a Document Manager icon in the Send To bar (the programs toolbar at the bottom of the PaperPort window) the next time you open it. If you don't see the Document Manager icon, click the Arrow buttons on either side of the Send To bar to scroll more program icons into view.



If you still don't see the Document Manager icon in the Send To bar, click Tools – Refresh Send To Bar. If that doesn't add the Document Manager icon to the Send To bar, click Tools – Send To Options, and in the Send To Options dialog box, scroll to select the Document Manager icon and then mark the Include Icon On Send To Bar check box.

After you scan a document into PaperPort, you can use the Document Manager icon on the Send To bar to send the new file to EZAgent.

**Tip:** When you install ScanSoft™ PaperPort, a new button (the Print To PaperPort button) appears in Microsoft Word, in the Standard toolbar. After you create and save a document in Word, you can click the Print To PaperPort button in the Standard toolbar to add the open document to PaperPort, and from the PaperPort window you can add the file to the EZAgent Document Manager.

1. Select the icon for the document in the PaperPort window, then click the Document Manager icon in the Send To bar.
2. Select the client name, and click the Do It button. You can use any techniques you normally use in the Clients page to navigate to your client (e.g., type the first few letters of the client name to jump to that part of the list).
3. In the Enter Document Title box, enter a document title. If you want to link to the original file rather than create a copy, click the Create Link To This Document Only check box to mark it.  
If you want to attach a copy of the file, leave the check box clear.
4. Click OK.

The file is linked or attached, the title you typed appears in the Title pane, and the image (if it's a BMP or JPG file) appears in the Image Preview pane.

## Using Your Attached or Linked Files in EZAgent

Now that you've got files in the Images window in EZAgent, here are some things you can do with them.

Want to take a quick look at a form you've saved in the client's Images window while you're talking to your client? Select the client name, click the Images window, select the file title in the left pane and open it.

Whether a file is linked or attached, you can open it by:

- Double-clicking the file title in the Title pane on the left side of the Images page

- Clicking the title to select it, then double-clicking in the Image Preview pane on the right side of the Images page

**Note:** Only BMP and JPG images can be viewed in the Image Preview pane – other graphics files (such as PDF, Email and TIF files) cannot be viewed in the Image Preview pane, but can be opened in their native programs by double-clicking in the Image Preview pane.

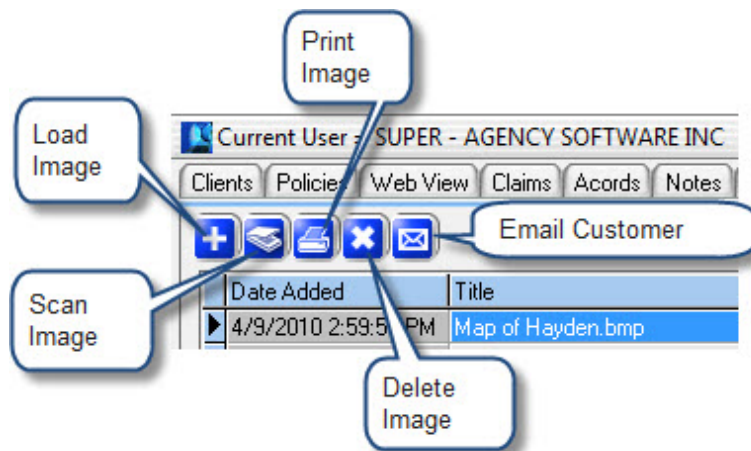
Also, graphic images will be stretched to fit in the Image Preview window. If the picture has unusual proportions, it will be stretched out of shape in the Image Preview pane.

If the picture in the Image Preview is too big to see all at once, use the scroll bars to scroll to hidden parts of the picture, and/or use the Zoom buttons below the image pane to magnify or reduce the image view.

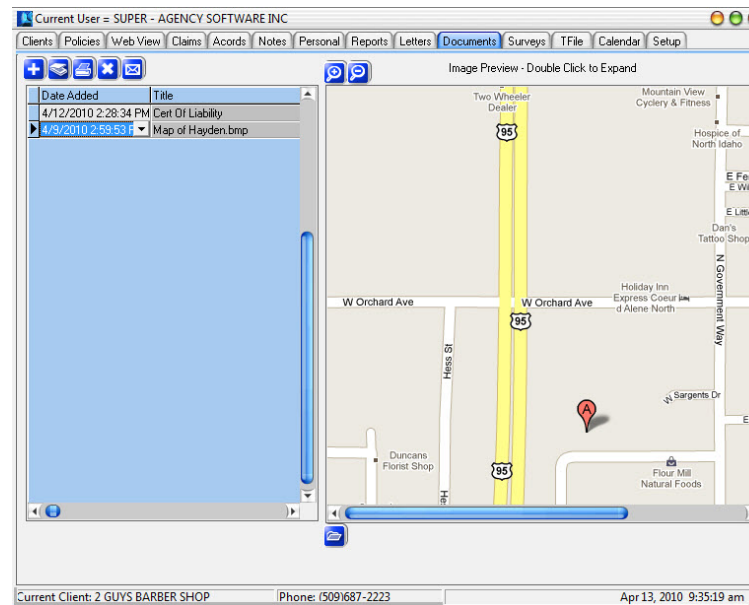
If your file opens in the wrong program, or tries to open in a program you don't have, follow the steps on page 87 to change the file association.

Above the list of titles in the Images page, there are five buttons:

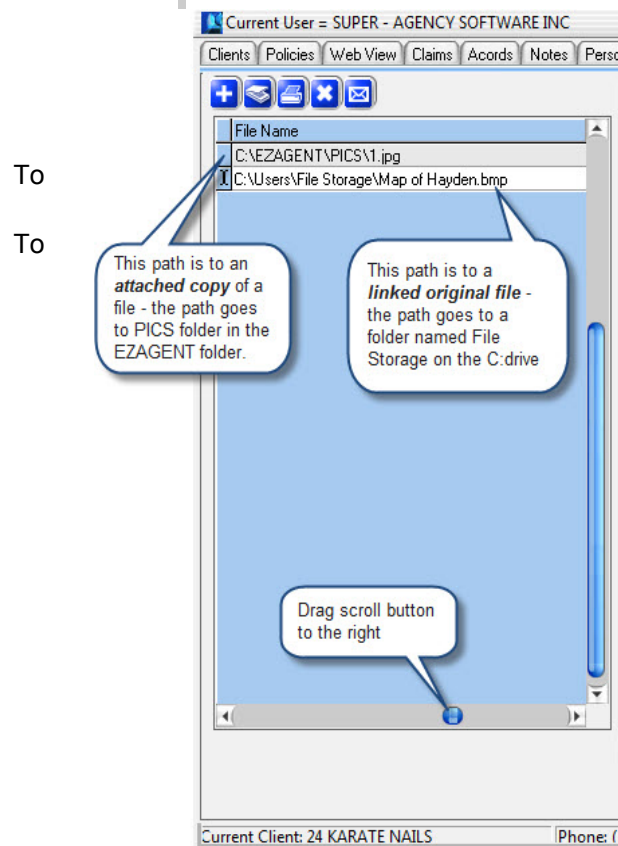
- The **Load Image** button loads files from your computer into the Images page.
- The **Image Processing** button activates your scanner.
- The **Print Image** button sends the selected file to the printer.
- The **Delete Image** button deletes the file from the client's Images page.
- The **Email** button is used for emailing any document



Want to open a non-graphic file, such as an attached letter, and work on it? Either double-click the file title on the left, or double-click in the Image Preview pane on the right.



**Note:** Titles are in alphabetical order (as you can see in the figure).



change the spelling of a file title, click the title name in the list and type your changes, then click on a different title to save your changes. The list will be instantly re-alphabetized.

see the location of the file, drag the horizontal scroll button at the bottom of the Title pane to the right. You'll see the FILENAME column, showing the path to each file.



## The Surveys Window

Click the Surveys tab to open the Surveys window. There are more than 200 Business Specific Survey Questionnaires in EZAgent. Most Survey Questionnaires are 7 – 10 pages long and contain a checklist of items that will certainly help reduce your E&O risk – and possibly uncover underwriting credits. Use the scroll bar on the right side of the list of survey titles to locate survey you want. **Double-click on the survey title** to display it in the window. When you have the survey you want open, click the print button to print it. You can take the survey with you when you go to an insured site, and enter information right on the pages.

You can edit surveys to better suit your agency. Click in the survey text and edit it as you would in a word processor. Use the scroll bar on the right of the open survey window to scroll though the entire survey.

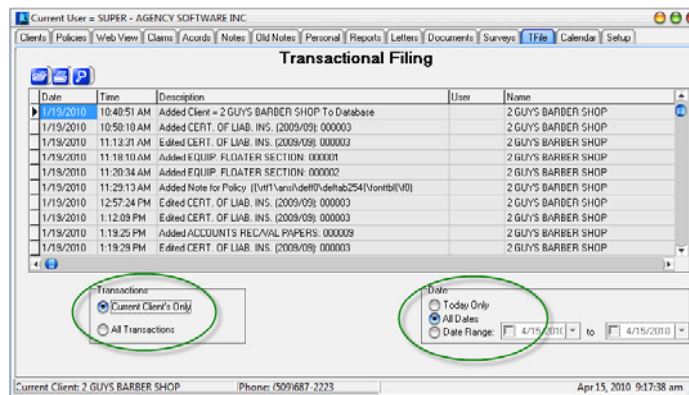
The three buttons in the upper-left corner are Print Survey, Open Saved Survey (which opens surveys you've saved under a new name), and Save As New Survey (which saves a survey under a new name).

SURVEY_TYPE	SIC
BICYCLE MANUFACTURING	3751
BICYCLE SHOP	5941.7699
BOOK STORE	5942.5932.5192
BOTTLED WATER COMPANY	2086.5499
BOWLING CENTER	7933
BREWERY	2082

## The TFile Window

Click on the TFile tab to open the TFile window. The TFile window maintains a permanent chronological history of everything that is done in the EZAgent database.

There are three buttons at the upper-left corner of the transactions list: Manually Add New TFile Item, Print History File, and Find a Word or Phrase in History. The middle of the window lists all EZAgent transactions, depending upon the display choices selected at the bottom of the window.



### The TFile Window Buttons (left to right)

- **Manually Add New TFile Item** Opens the Add TFile Item window in which you can manually enter EZAgent transactions (see below to learn more).
- **Print History File** Creates a printed list of the displayed transactions (Tip: In the Enter Number of lines To Break Transactions Into box, if you choose 2, the report will be much more readable).
- **Find a Word or Phrase in History** Searches the Date, Time, Description, and User columns in the displayed transactions for the word or phrase you type – the Find What box is case-sensitive (if a transaction contains the name “Renewed” and you type “renewed”, the transaction won’t be found). Don’t bother with the check boxes (they are non-functional), but the Up and Down boxes *are* functional – if a search doesn’t find your word/phrase, switch the Up/Down option and search again.

### Transactions Display Options

- **Current Client Only** Displays transactions involving the client currently selected in the Clients window within the selected date range.
- **All Transactions** Displays all EZAgent transactions within the selected date range.

### Date Range Display Options

- **Today Only** Displays transactions performed today for the client selected in the Transactions options.
- **All Dates** Displays transactions for all dates for the client selected in the Transactions options.
- **Date Range** Displays transactions for the selected date range for the client selected in the Transactions options.

### Manually add a TFile item

If you click the Manually Add New TFile Item button, you will open the Add TFile Item window.

**Add TFile Item**

**Submission Info:**

Date: 3/19/2005 Time: 3:21:59 PM By User: JAK

**Attach To:**

Client: Jake McCormack OR Policy:

Description: Received fax from client with details of Auto accident

OK Cancel

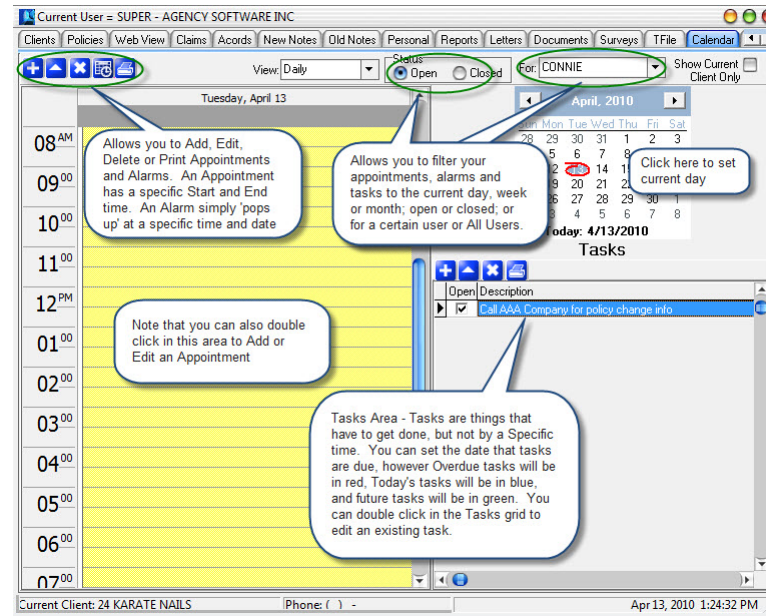
- **Date** Automatically current, but you can change it if you need to.
- **Time** Automatically current, but you can change it if you need to.
- **By User** Logged-in user name.
- **Client** Choose client name from dropdown list.
- **Policy** Choose Policy # from dropdown list (the entire list of policy numbers appears – when you select a policy number, the client name is filled in).
- **Description** Type a description of the transaction.

Click OK to save the entry and return to the TFile window, or click Cancel if you decide not to save the transaction.

**Note:** Transactions cannot be deleted, *ever*. They are permanent. Therefore, the TFile should not be used as a Notes file or a Tickler file for clients. Use either the Notes window or the Tickler window to record information that's not transaction-related.

## ***The Calendar Window***

The 'Calendar' tab – looks and works more like the Microsoft Outlook calendar, but gives you the increased functionality of maintaining multiple schedules in your office without installing expensive server software. Note that before you can enter an appointment, alarm, or task for yourself or someone else in the office – you must first add them to the Employees button under the Setup tab. In addition, for your alarms to properly activate, you must be 'Logged in' as the user that the alarm was set for.



To set an Alarm-Pop Up move the calendar to the right day and then either double click on the yellow tablet at the correct time or click the + button in the upper left corner then on the new Tickler screen type in a description of what the pop-up reminder is for and then select the Rep who needs to receive the pop-up.

**New Tickler**

Activity Type:  
☒ Alarm Only (Alarm Pops up at a Certain Time)  
☐ Appointment (Specific Start Time/End Time)  
☐ Task (Due Time Only)

Status: ☒ Open ☐ Closed

Attached to Client:

Set Pop Up Alarm? ☒ Yes ☐ No

Alarm Popup Time:  at

For Rep(s):  
 Select All ☐  
 CMR  
 CONNIE  
 SUP  
 TY  
 USER1  
 USER2  
 USER3  
 USER4  
 (Hold Ctrl Key Down for Multiple)

With Description:

Notes:

OK Cancel

### Alarm Only/Appointment/Tasks – What’s the Diff?

Alarms are something that happen just once in a finite moment of time.

Setting an alarm will cause an alarm to pop-up on your screen as a reminder.

An appointment is a specific block of time with a starting and ending point. By setting ‘Setting Pop Up Alarm’ to Yes, you will receive a pop-up reminder at the beginning of the appointment.

A task is something that has to get done but not by a specific time.

Tasks are shown in the lower right hand corner of the screen. Tasks turn red in color if their due date is passed.

Note that you can set an event for multiple people by holding the ‘Ctrl’ button down while selecting multiple reps from the list. The list is populated by entering ‘Employees’ under the ‘Setup’ tab.

**When a tickler alarm goes off:** You can “snooze” the tickler to go off again later by clicking the Snooze button and setting a new time. Or you can close the tickler permanently by clicking the Cancel button.

**Tickler Alarm**

**Your Tickler Alarm Has Been Activated**

Date: 4/13/2010 Time: 8:00:00 AM Rep: CONNIE  
 Client Name: 24 KARATE NAILS  
 Office Ph: Home Ph: 208-667-1234  
 Description: Meeting with Carla regarding Policy Renewal  
 Notes:

Cancel Alarm Snooze Go to Clients Go to Calendar

**Edit a tickler:** To edit a tickler, either double-click that tickler in the list, or click the tickler in the list to select it, click the Edit Tickler option below the list, and click Do It. Make your edits and then click OK.

**Delete a tickler:** To delete a tickler, click the tickler in the list to select it, then click the Delete Tickler option, and click Do It. When queried if you're sure, click Yes.

### **Change Calendar View**

You can change your view from Daily to Weekly or Monthly by selecting the appropriate view from the dropdown on the top of the screen. Once you've selected your preferred view, you can print your calendar using the print Calendar button.

## The Setup Window

Click the Setup tab to open the Setup window. In the Setup window, you can:

- Check your agency information (the producer information that appears on your ACORD forms) – if you need to change it, call Agency Software at 800-342-7327.
- Set up your Companies Information database.
- Set up your Employees Information database.
- Change the users who can login to EZAgent.
- Change the number of days between automatic data backups.
- Change the skin (the appearance) of EZAgent.

The screenshot shows the 'Setup' window of EZAgent. The title bar indicates 'Current User = SUPER - AGENCY SOFTWARE INC'. The 'Setup' tab is selected in the top menu bar. The 'Agency Information' section contains fields for Agency Name, Address, City, State, Zip, Phone, Fax, Email, and License #. The 'Notes View' section has radio buttons for 'Old Notes', 'New Notes' (selected), and 'Both'. The '# of Days Between Backups' is set to 7, with a checkbox for 'Don't Backup Documents and Pictures. I have another Backup Program that does this.' The 'Coverage Classes' section has radio buttons for 'Show All Coverage Classes' (selected) and 'Show Only Recommended Classes'. A sidebar on the right contains buttons for 'Employees', 'Companies', 'Demographics', 'Skins', and 'Reset Grids'. The status bar at the bottom shows 'Current Client: 2 GUY'S BARBER SHOP', 'Phone: (509)687-2223', and the date/time 'Apr 09, 2010 10:32:00 am'.

### Your Agency Information

The Agency information in your Setup window is the information entered when you installed and registered EZAgent. You must call Agency Software, Inc. (800-342-7327) to change any of this information. This is the information that appears on your Acord forms and letters.

### Automatic Data Backups

In the # of Days Between Backups box, you can set a schedule for automatic data backups. If, for example, you select 7, then every 7 days the first thing that happens when EZAgent is opened is a data backup. EZAgent creates a compressed backup file of all your EZAgent data and saves it in the EZAgent\Data001\Backup folder.

Even with the EZAgent backup it is still necessary to backup your data in case of hardware failure. We recommend you get an external hard drive, plug it into your machine, exit EZAgent, go to Start, Programs, EZAgent and click on Backup, click OK, then in the Save In box click the dropdown arrow and direct it to your external device.

## Companies Information Database

Click the Companies button (on the right side of the window) to open the Company Information window. The toolbar buttons will allow you to Add, Edit, Delete and scroll through the companies entered in EZAgent.

1. Click the + (Insert Record) button to add a new company to your Companies database.
2. Fill in the fields, and then click the check mark button to save your entries.

Be sure you enter the login page URL for the company if you want to include it in the Web View window list of companies.

3. Repeat steps 1 and 2 to add more companies, and click OK when you're finished.

The first company in the list that has a URL entered in the Home Page box is the default company, the web site that opens automatically when you click the Web View tab. See the Web View section for more information.

**To edit a company's information:** Scroll to the company and click the ▲ (Edit record) button. Make your changes, then click the ✓ (Post edit) button to post the changes.

**To delete a company:** Scroll to the company and click the ✕ (Delete Company) button.

The screenshot shows the 'Company Information' window. The title bar is 'Company Information'. The toolbar contains buttons for navigation (left, right, first, last) and actions (Add, Edit, Delete, Checkmark, X). The form fields are as follows:

- Name: FARMERS INSURANCE GROUP
- NAIC Code: [empty]
- Home Page: https://eagent.farmersinsurance.com
- Contact: [empty]
- Address: [empty]
- Address2: [empty]
- City, State, Zip: [empty]
- Phone 1: [empty]
- Phone 2: [empty]
- Fax: [empty]
- Agency Commission: [empty] %
- Agency Code: [empty]
- DOT Code: [empty]
- Billing Method: [empty]
- Lines Written:
  - ☒ Personal Lines
  - ☒ Commercial Lines
  - ☒ Life & Health

At the bottom are 'OK' and 'Cancel' buttons.

## Employees Information Database

On the Setup tab, click the Employees button to open the Employees form.

The toolbar at the top is like the rest of the toolbars in EZAgent – with the buttons, you can Add, Edit and Delete users and employees in EZAgent.

Each employee's User Name and Password will be their login to open the EZAgent program (the password is optional).

The Screen Name and Screen Password boxes at the bottom of the form are that user's login name and password for all company websites in the Web View window, if they use the same login name and password at all websites. If not, leave them black and see User Password Setup on next page. For example, when you click the Web View window in EZAgent, the Web View window automatically opens the first company web site you have entered in the

Companies form (with a URL in the Home Page box), and the user is automatically logged in at that web site using the Screen Name and Screen Password that are entered in that user's Employees form.

**Note:** You are limited to 5 users unless you purchase extra seats. When you need to change employees in EZAgent, select the employee that's leaving and edit that record to change the username and password to the employee you want to add. (You do not need to enter a password, but using passwords makes the data in EZAgent more secure.)

The screenshot shows the 'Employees' form in the EZAgent application. The form is titled 'Employees' and has a toolbar at the top with icons for navigation and editing. The form fields are organized into sections: USERNAME (TY) and Password; FirstName (Tiffany) and LastName (York); Address (123 W Asphalt Drive); City (Hayden), State (ID), and Zip (88888); Phone (555-555-5555) and SSN; Default Commission % (30), Default Salary, and Commission A/P Chart Number; Default Screen Name (tiff123); and Default Screen Password. There are checkboxes for 'EZAgent User' and 'Supervisory Access'. A speech bubble points to the 'Default Screen Password' field with the text 'User Password Setup'.

#### To edit an employee record:

1. Login as a user who has supervisory access, and open the Employees information database.
2. Use the scroll buttons at the top of the form to scroll to the employee whose data you want to change.
3. Click the Edit Data button – the button that looks like a triangle.
4. Edit the user data, and be sure you mark or clear the Supervisory access check box to give that employee the kind of access you want them to have.  
Supervisory access allows a user to change agency and employee data. A Supervisory user will have the Setup tab in the EZAgent program window, and will have all the Management reports on the Reports tab.  
A user without Supervisory access will not have a Setup tab in the program window and will not have Management reports in the Reports window.
5. Click the check mark button to save the edited employee data.
6. Click Filter Employee Database (magnifying glass button) to do a search. Type in your search criteria then click the Filter Employee Database button again to show results.
7. Click the Restore Client List button to restore your employee list after filtering.

8. User Password Setup allows each user to store his or her login name and login password for each insurance company website.

a. Select the correct user in Employees Database



b. Click the icon in lower right corner of Employees Database

c. Click the + button

d. Select Company from Dropdowns

e. Enter Login Name and Password

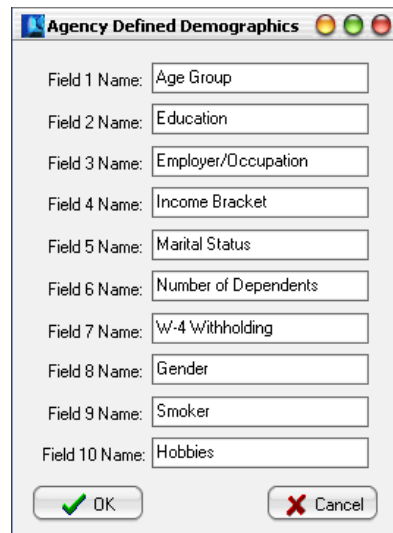
f. Post Edit

**Note:** You can't have duplicate employees entered in the Employees form – if you enter duplicate employee names, you'll get a Key Violation error the next time you login.

The Default Commission % will automatically prefill into the policy screen, if that employee is selected as one of the Reps in that policy.

### Agency Defined Demographics

Click the Demographics button to open the Agency Defined Demographics form.



The image shows a software dialog box titled "Agency Defined Demographics". It contains ten text input fields, each preceded by a label "Field X Name:". The fields are filled with the following text: "Age Group", "Education", "Employer/Occupation", "Income Bracket", "Marital Status", "Number of Dependents", "W-4 Withholding", "Gender", "Smoker", and "Hobbies". At the bottom of the dialog, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Field Name	Value
Field 1 Name:	Age Group
Field 2 Name:	Education
Field 3 Name:	Employer/Occupation
Field 4 Name:	Income Bracket
Field 5 Name:	Marital Status
Field 6 Name:	Number of Dependents
Field 7 Name:	W-4 Withholding
Field 8 Name:	Gender
Field 9 Name:	Smoker
Field 10 Name:	Hobbies

You can decide what demographic data you want to track for your clients. These fields can be used for creating reports or for marketing a specific group of customers. You can enter up to 10 field names, which will show up in the Demographics section on the Personal window.

## SECTION V: TROUBLESHOOTING

### ***EZAgent Slow to Open***

Try disabling the anti-virus program on the local machine. If the program opens more quickly, the anti-virus is the problem. You need to set exclusions in your anti-virus program so that the anti-virus can run without interfering with your EZAgent database files. Go to the web site [www.agencysoftware.com](http://www.agencysoftware.com). On the Support page, click the link that reads “Running Slow? Locking Up? Norton AntiVirus Customers Should Read This”, and print out the report that tells you which exclusions to set (and how to set them in Norton).

### ***EZAgent Locks on Opening***

If EZAgent does not open and gives a NOT RESPONDING message when the button is double-clicked, check your video settings by right-mouse-clicking in an empty space on the desktop. On the dropdown menu, select PROPERTIES. When the DISPLAY PROPERTIES box appears, click the SETTINGS tab. If the Color settings in the lower-left corner reads 16 colors (not 16-bit high color), the video settings do not meet the hardware requirements for EZAgent. Call your local tech to help correctly configure your video card. EZAgent will not run correctly until this is resolved.

### ***User Can't Delete Clients***

User doesn't have supervisory access. User needs supervisory access to delete clients in EZAgent.

### ***User Can't Add New Clients***

Close EZAgent on all machines. Click Start, Programs, EZAgent for Windows, Keyfix. Allow keyfix to run until you see the message “Rebuild Complete”.

### ***User gets Key Violation when Logging In***

Log in as a different user with supervisory access, and edit the Employees database (on the Setup tab) to remove/edit duplicate employee names.

### ***Cannot Perform Operation on Open Dataset***

This error occurs in the ACORD window. It is preceded by an error showing characters and stating that those characters are not a valid integer. Trying to add an ACORD form after that message will generate this error. This means that some data in the ACORD forms has corrupted. Call Technical Support immediately and prepare to transfer the data to Agency Software for examination and correction of the corruption.

### ***Index Out of Date***

This error usually occurs when someone has used Ctrl-Alt-Delete to get out of the software or has shut down their computer while EZAgent was running.

1. Close EZAgent on *all machines*.
2. Click Start, Programs, EZAgent for Windows, Keyfix.
3. Allow keyfix to run until you see the message “Rebuild Complete”.

### ***Corrupt File Other than Index***

This error message occurs when there has been an illegal operation in EZAgent, and is most often caused by workstation lockups and subsequent rebooting of the locked machines; or the use of Ctrl-Alt-Delete to shut down the computer while EZAgent is open.

1. Close EZAgent on *all machines*.
2. Click Start, Programs, EZAgent for Windows, Keyfix.
3. Allow keyfix to run until you see the message "Rebuild Complete".

If Keyfix doesn't solve the problem, call EZAgent technical support.

### ***Unrecognized Tag in Mail Merge***

This is an error message that is generated in the Letters window, when performing a mail merge, in which the fields specified to merge do not exist. If these are fields were selected by using the "SELECT MERGE FIELD" buttons, corruption has occurred in your LETTERS window. Call EZAgent technical support.

### ***Printer Doesn't Print from EZAgent***

This problem is most likely to occur when an agency is trying to print to a multifunction printer from EZAgent. There are some multifunction printers EZAgent will not print to. These include some Xerox WorkCenter XE series printers. There is no fix for this. The agency must print to a different printer.

### ***Text Won't Fit into Lines on Forms***

This problem is usually caused by having Large fonts set on the particular computer that has the problem. The ACORD forms are not designed to run in a Large-fonts environment.

To change the font settings back to Normal:

1. Right-click in an empty space on your computer desktop.
2. On the shortcut menu, click Properties.
3. In the Properties dialog box, click the Settings tab.
4. On the Settings tab, click the Advanced button.
5. On the General tab, you'll see a box labeled Font Size or DPI Settings (depending on your version of Windows). The box probably has "Large" or "125%" or some similar setting (again, depending on your version of Windows).
6. Click the arrow in the box to open a list of choices.
7. Choose Normal, or choose Other and set 100%.
8. Click OK to close every open dialog box. You may need to restart your computer (depending on your version of Windows).

## Index

---

### A

<b>Acord form menus</b>	
Adjust .....	59
Edit.....	57
File .....	56
Help.....	59
Options .....	58
Tools.....	58
View .....	57
<b>Acord form options</b> .....	50
<i>Acord form toolbar</i> .....	55
<i>Acord form window</i> .....	55
<b>Acord forms</b>	
Add New Form.....	50
Delete Client's Form.....	52
Duplicate Client's Form .....	52
Edit Client's Form .....	51
E-mail.....	70
Entering data in forms .....	59
Mark Forms for Mass Print.....	53
Move Forms to Diskette .....	53
Print Mass Marked Forms .....	53
Read Forms from Diskette .....	54
State-specific forms .....	51
<b>Acords Window</b> .....	50

---

### C

<i>Calendar Window</i> .....	100
<i>Certificate Holders</i> .....	60
Add from Master List.....	63
Add new .....	61
Blanks.....	62
Button .....	60
Delete .....	64
Duplicates .....	61
Edit.....	63
Menu .....	60
Print certificates.....	65
Print list .....	66
Same holder, multiple jobs .....	62
<b>Certificates, Print</b> .....	65
<i>Claims Window</i> .....	48

### Clients

Add a Client .....	34
Delete a Client .....	35, 37
Edit Client Information.....	35
Filter client list.....	36
Restore client list after filter .....	36
Clients Toolbar.....	35
<i>Clients Window</i> .....	34
Coverages.....	43
<b>Customer Demographics</b> .....	73

---

### D

<i>Document Manager</i> .....	84
Adding files .....	86
Desktop icon .....	88
Linking/attaching .....	84
PaperPort .....	91
Using linked/attached files .....	92
<i>Drivers Database</i> .....	69

---

### E

E-mail doesn't work .....	71
<i>E-mail forms</i> .....	70
<i>Equipment Database</i> .....	68

---

### H

Help Files .....	32
------------------	----

---

### I

<b>Installation</b>	
Dedicated server .....	21
Non-dedicated server .....	28
Non-dedicated server setup .....	26
Standalone .....	16
Workstations .....	30
INSTALLATION.....	16
Internet access required .....	14

---

## L

### Letters

<b>Attach to client</b> .....	82
<b>Custom letters with merge fields</b> .....	80
<b>Merge client data</b> .....	79
rtf file type .....	80
Letters Window .....	79
Logging in .....	31

---

## M

<b>Mailing labels</b> .....	78
<b>Mapping a drive letter</b>	
W2000/XP Non-dedicated server .....	26
Workstations .....	28

---

## N

<i>Notes Window</i> .....	72
---------------------------	----

---

## P

<i>Personal Window</i> .....	73
<b>Policies</b>	
<b>Add New Policy</b> .....	39
Blue Fields .....	40
Coverages .....	43
<b>Display Options</b> .....	38
<b>For Options</b> .....	39
<b>Policy Options</b> .....	38
Policies Window .....	38

---

## R

### Reports

<b>Custom</b> .....	76
<b>Delete</b> .....	78
<b>Edit</b> .....	78
<b>Mailing labels</b> .....	78
<b>Open</b> .....	75
<i>Reports Window</i> .....	75
rtf file type .....	80

---

## S

### Setup

<b>Agency information</b> .....	103
Automatic backup schedule .....	104
<b>Companies Information Database</b> .....	104
<b>Demographics</b> .....	108
<b>Edit employees</b> .....	106
Employee information .....	105
Users .....	105
<i>Setup Window</i> .....	103
<b>Sort By Heading</b> .....	33
<i>Surveys Window</i> .....	96
SYSTEM REQUIREMENTS .....	12

---

## T

<b>Technical help</b> .....	14
TECHNICAL INFORMATION .....	12
<b>TFile</b>	
<b>Display</b> .....	98
<b>Find Word or Phrase</b> .....	97
Manually add item .....	98
<b>Print history</b> .....	97
<i>TFile Window</i> .....	97
Tickler	
Alarm .....	101
Delete .....	102
Edit .....	102
<b>Troubleshooting</b>	
<i>Agency Pro Locks on Opening</i> .....	109
<i>Agency Pro Slow to Open</i> .....	109
<i>Cannot Perform Operation on Open Dataset</i> .....	110
<i>Corrupt File Other than Index</i> .....	110
<i>Index Out of Date</i> .....	110
<i>Printer Doesn't Print from Agency Pro</i> .....	111
<i>Text Won't Fit into Lines on Forms</i> .....	111
<i>Unrecognized Tag in Mail Merge</i> .....	110
<i>User Can't Add New Clients</i> .....	109
<i>User Can't Delete Clients</i> .....	109
<i>User gets Key Violation when Logging In</i> .....	109
TROUBLESHOOTING .....	109

---

## V

Vehicle Database .....	66
<b>Vehicle List, Print</b> .....	67

---

## W

Web View		Letters .....	79
Login .....	46	<i>Notes</i> .....	72
Web View Toolbar.....	46	<i>Personal</i> .....	73
<i>Web View Window</i> .....	45	Policies .....	38
<i>Window</i>		<i>Reports</i> .....	75
Acords .....	50	<i>Setup</i> .....	103
<i>Calendar</i> .....	100	<i>Surveys</i> .....	96
<i>Claims</i> .....	48	<i>TFile</i> .....	97
<i>Clients</i> .....	34	<i>Web View</i> .....	45
<i>Document</i> .....	84	<i>Workstations</i>	
		Installing program .....	30
		Mapping a drive .....	28
		<i>Setup</i> .....	28